Docket #: Brown.E-12

APPLICATION

Of

Eric W. Brown

For

UNITED STATES LETTERS PATENT

On

Personalized Health Video System

Component Subsystem Definitions and Relationships

The Personalized Health Video System (the "System") comprises one instance of a Healthcare Signal Telemetry System, which may be used for selling healthcare related products. Enhancements and modifications to the Healthcare Signal Telemetry System allow the same core technology to be used to sell numerous other types of products.

The technology disclosed herein is an extension of the technology previously disclosed in the following patent applications:

Provisional Application	Healthcare Signal Telemetry System	60070521	01/06/98
Provisional Application	Medical Device Telemetry Accessory	60071623	01/16/98
Provisional Application	Wound Management Medical Telemetry System	60088727	06/10/98
Patent Application	Apparatus and Method for Improving Patient Compliance with a Medical Program	09225173	01/04/1999
Patent Application	Method for Improving Patient Compliance with a Medical Program	09266647	03/11/99
Continuation-in-Part	Method for Improving Patient Compliance with a Medical Program	09322209	05/28/99

The complete System includes the following:

1 Personal data collecting devices (the "Data Collectors") may be:
- 1.1 tangible products such as the wave-energy enabled pill bottle lids previously disclosed,
- 1.2 forms such as those that commonly appear on a computer screen for data entry,
- 1.3 observational systems such as programs that monitor database or internet traffic for changes or information,
- 1.4 other software enabled systems for determining personal data such as health care status,
- 1.5 other data entry methods, such as creation of shopping lists based upon item desired by the End-User.

2 Internet-enabled browser (the "Browser") such as Microsoft Internet Explorer or Netscape Navigator or Mosaic. The Browser may include any internet-enabled viewing system for text, graphics or a combination of the two.

3 Information server for database storage and manipulation (the "Database") such as Microsoft SQL Server 7.0.

4 Video server means for streaming video images and audio tracks (the "Video Stream") such as Microsoft Media Server or Real Networks Video Server.

5 Internet server means (the "Internet Server") for sending html web pages and other formats of Browser-viewable pages over the internet.

6 Internet connection means (the "Pipe") for linking Browser, Database, Video Stream and Internet Server with each other and with other Internet users. Preferably, the Pipe will have high-bandwidth such as a T1 line, cable modem or DSL. However, ordinary dial-up modems are sufficient too.

7 Server operating systems such as Windows NT or Unix (the "Server Operating System"). Depending upon the capabilities of the Server Operating System and the underlying hardware platform, the Database, Video Stream and Internet Servers may reside on the same machine or may reside on several machines that are linked with the Pipe or other linking means.

8 End-user operating systems such as Windows 95, Windows 98 or Windows NT. However, other operating systems such as Linux may also be used (the "User Operating System").

9 Video camera and microphone for creating custom videos that are commonly available. Preferably, the video cameras have parallel or USB connections to a personal computer. The microphone, preferably, links to a sound card or similar circuitry within the personal computer. However, the use of integrated camera/microphones and other formats of cameras and microphones may also be used. Collectively referred to herein as the "Camera".

10 Personal computers, such as Pentium II and Pentium III based PCs that are commonly available with viewing monitors, keyboards, mouse, speakers and other typical accessories. Collectively referred to herein as the "PC".

11 Specialized video creation software (the "Video Software") for generating custom videos, including controls for recording and setting camera/microphone functions. Such Video Software also replays videos after creation and compresses videos for distribution to others using the Video Stream.

12 Means for transferring data from Data Collectors to the Database. Such means may include the base-station device which receives the wave-energy signals from the Data Collectors and sends the corresponding information to the Database. The method of sending the information to the Database includes formatting it for transfer in the Pipe.

13 Means for creating graphical representations of data from the Database, typically in the form of time plots and charts. Preferably, multiple graphic representations are shown with axes synchronized for comparative viewing. The data in the Database may include data that is transferred from the Data Collectors. It may also include data that is received from other sources, such as a catalog of products and their affiliated purposes. It may further include data that is received from other sources which describes a process or series of steps to perform to accomplish a goal. Any and all such graphical representations are referred to as the "Charts".

14 Means for accessing and graphically viewing pictures of products or illustrations of tangible items or illustrations of process-oriented steps, as may be stored on the Database. An example of such a process are the steps necessary to prepare a meal, including making a list of items to procure, preparing the items for cooking, instructions for cooking times, and illustrations of serving suggestions. Any and all such graphical representations are also referred to as the "Charts".

15 Means for hearing sound from the audio track of the Video Stream.

16 Means for seeing moving pictures from the Video Stream.

17 Means for determining personalized information from the Database as may apply specifically to one end-user.

18 Means for selecting graphical images (items #14 and 13) and placing them in a list for later selection in random or sequential or repetitive order.

19 Means for creating the video in a window on the screen while selecting the graphical images from the list. Such images appearing in an adjacent window in sync with the video message mentioning or describing such graphical image.

20 Definitions of different types of system users:
20.1 The "End-User" is a consumer or patient or family caregiver. Typically, this person would be a customer for the business deploying the System.
20.2 The "Video-star" is a person who represents the business (or its affiliated or related interests) and is using the System. Typically, this person would be a nurse who is advising the patient or the family caregiver about some aspect of healthcare. However, this person could also be a sales representative selling health-related products, such as wheelchairs, or other non-health-related products, such as flowers.

21 Means for automatically creating a relationship between the personalized information about the End-User and the graphical images generated from the Database and the text format data from the Database. Then further means for displaying a text or visual message that cues the Video-star to mention appropriate portions of the personalized information in sync with selecting the Charts.

22 Means for automatically generating a script or list of points for the Video-star to mention. Such means includes running pre-defined rules on the database to identify End-Users who are likely to benefit from such information. For example, the pre-defined rule might be "remind any End-User taking medications to get a refill if the Data Collector means indicates that 30 days have passed in which the medication was taken". Please note: this rule differs from a simple 30-day reminder to get a refill (current state-of-the-art) because it

counts the number of days in which the medication was actually take (one of our advances of the state-of-the-art).

23 Means for automatically generating Charts, such as a shopping list or purchasing order form. Such generated charts are created based upon running pre-defined rules on the database.

24 Means for allowing the Video-star to review the Charts and personalized information and then take notes for items to mention to the End-User in a video presentations consisting of the Video Stream and synchronized Chart displays.

25 Means for allowing the Video-star to review the Charts and personalized information and then prepare notes to be displayed to the End-User in a video presentations consisting of the Video Stream and synchronized Chart displays. One or more such Charts would include the display of notes just created by the Video-star.

26 Means for generating information that is of temporal use to the End-User, including presentation of such information in text, graphical or video formats. Such temporal information may be in the form of "Alerts" or "Suggestions". The Alerts might include information about a data parameter that was out of range. The Suggestions might include purchasing suggestions for upcoming holidays. These Alerts and Suggestions are displayed to the End-User. These Alerts and Suggestions are also displayed to the Video-star prior to creation of a Video Stream. The Alerts and Suggestions are one form of the automatically generated scripting information.

27 Many custom prepared videos with associated and synchronized chart presentations can be made using commonly available software such as Microsoft Netshow or Real Networks RealPresenter. However, the drawbacks of these products include an inability to link directly to databases, a time-consuming and expensive method of preparation and delivery, and an inability to randomly select charts while in the midst of creating the video. Also, these products lack the ability to automatically generate scripts for the person creating the video. All these limitations are addressed with the current inventions described herein.

Product Specification and General Specification for a Personalized Health Video System

A product specification and general specification for one embodiment of the System is attached herein. In these specifications, some of the descriptions use slightly different terminology.

The specification includes an example of the System in which a Nurse is monitoring a care-recipient at home. Since most care-recipients are elderly, the Nurse often, but not always, communicates with a family caregiver such as an adult child living in the same home. With respect to terminology, the Nurse is the "Video-star". The term "Nurse" also includes other clinician and non-clinical persons who might assist with the care of the End-User. The term "System" is also referred to as CareHelper.com, which is the web-enabled platform upon which the embodiment of the technology has been built.

The care-recipient and family caregiver are aggregated to be the "End-User". The Nurse Station is the PC workstation that a Nurse uses to access a the Database and create the Video Stream.

The Base-Station Hardware and Software runs on the End-User computer and allows the "Data Collector" devices (pill bottle, blood pressure monitors, etc.) to link to the "Database". The Browser also allows the End-User to create, view, access, modify and otherwise interact with a Shopping List Manager. This is another form of a Data Collector in which information is collected from the End-User regarding personal shopping habits or desires.

The "Alerts" window which appears on the End-User homepage functions to notify the End-User of temporal items. The Suggestions and Reminders window which appears on the Shopping Manager screen and End-User homepage functions to notify the End-User of purchasing suggestions or reminders.

The Alerts, Suggestions, Reminders, Shopping List information, Database information, and Charts formed from the Database information all appear on the Nurse Workstation Screens. The Nurse is able to select any or all of these items, in any order including repeating any such item, while creating the Video Stream. These are then saved, compressed and displayed to the End-User in sync with the video message.

Such Video Stream message includes health status information, reminders to make purchases, reassurance, rapport-generating statements, educational information, and/or other information or commentary as may be deemed advisable by the Nurse. Sample of such video commentary were previously disclosed in the above-mentioned patent applications.

General Specification comments: the embodiment described herein describes the example of using the invention for healthcare applications. It should be noted, however, that the technology can just as easily be applied to applications outside of healthcare.

For example, the System could be used with a healthy consumer undergoing a diet and exercise program. The Data Collectors would measure body fat, calories burned, distance walked, and body weight. The shopping list would include diet bars and powders. A fitness consultant, rather than a nurse, would be the Video-star. The fitness consultant would recommend new exercises, provide encouragement and support, and suggest purchases of appropriate nutritional supplements. The End-User would use the Browser to receive this information, including Video Streams from the fitness consultant with selected synchronized charts.

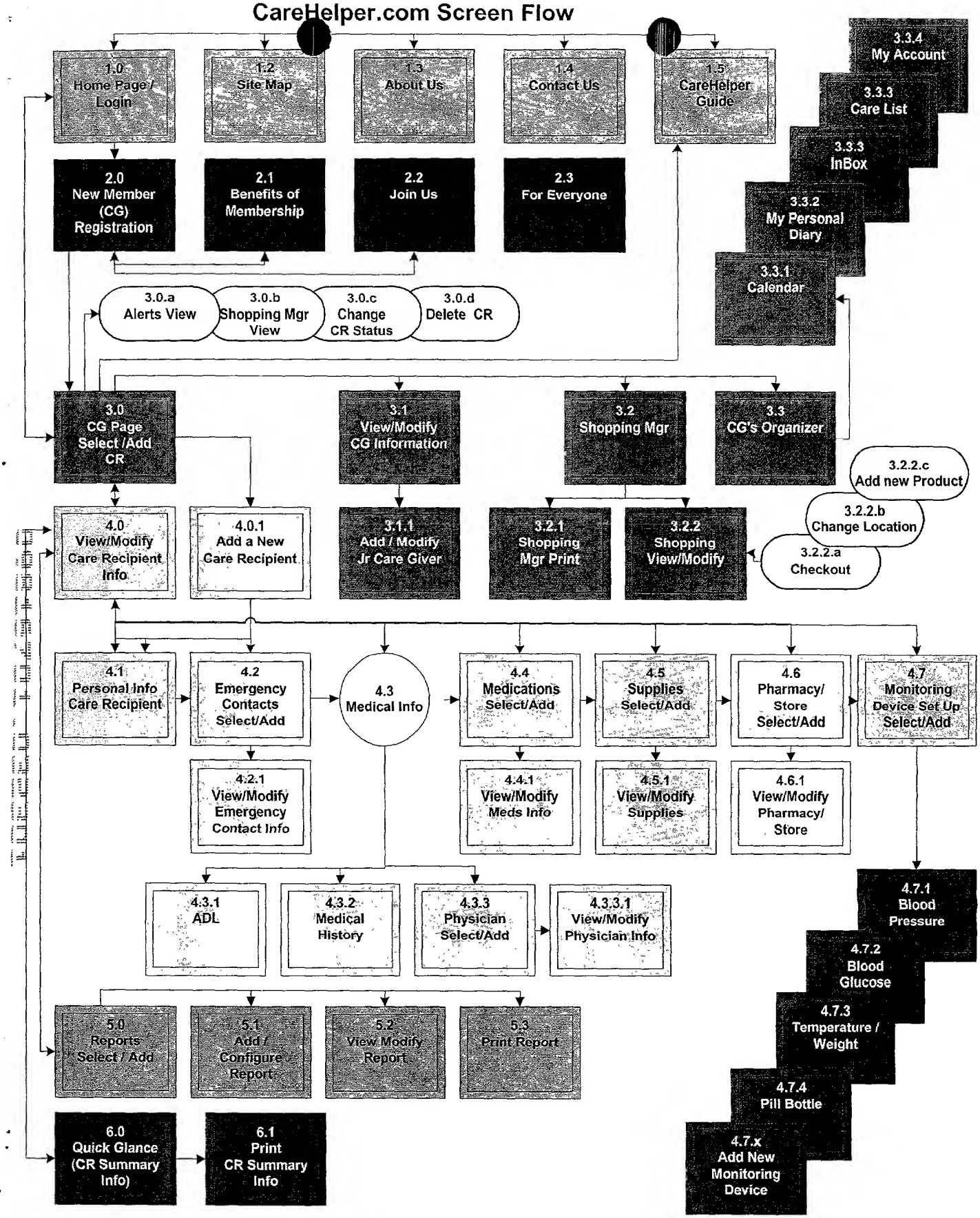
In another example, the System could be used with a consumer looking to purchase cruise ship tickets or automobiles. The Data Collectors would include forms about their interest in different destinations or vehicle models. The Charts would include images of different destination, accommodations, vehicle features, and/or financing options for the trip or vehicle purchase.

In such a manner, the invention disclosed herein, which is based on technology previously disclosed, has application in many fields with health, fitness, diet, nutrition, travel, and consumer purchases.

Likewise, the invention has application in many forms of business-to-business relationships. For example, the System could be used by sale representatives for companies selling integrated circuits and electronic components to manufacturers of electronic devices. The Video-star would be the sales rep of the component provider. The End-User would be the purchasing agent of manufacturer. The Data Collection devices would include the manufacturer's inventory database system. The Video Stream would include data about needed components including Charts which illustrated products, showed graphical representations of inventory usage or status, and automatically generated purchase order forms for the End-User to approve.

In this manner, in all fields of business and commerce, the described invention offers a low-cost method by which status-reporting and sales-generating data can be deployed to the purchasers of products.

CareHelper.com Screen Flow



Legend: **CG** - CareGiver; **CR** - Care Recipient;

CareHelper.com Design Document

11/29/99 Version

CareHelper.com Design Document

The purpose of this document is to formally document the design, development and user interface of the CareHelper system. This document is to be used to communicate between the Design, Development and QA team as to the requirements, design intent, identify any issues or concerns and document opportunities for future phase implementation.

The document includes:

- Overview CareHelper.com
- CareHelper Technology Architect Overview - Eric
- Recommended System Configuration / Minimum Requirements
- System Issues and Concerns
- Design, Development and QA Team
- System Standards
- Screen Process Flow
- Data Model
- Navigational / Menu Bar Description
- Graphic Screen Design
- Screen Layouts and Technical Notes
- Backup and Restore Procedures - David
- Disaster Recovery Procedures - Eric
- Version Control Procedures - David
- Test Procedures
  - Software Validation
  - Failure Mode Efficiency Analysis (FMEA) Matrix
- Appendix:
  - Table and Field Descriptions
  - Development Project Work Plan
  - Glossary of Terms

SYSTEM ISSUES AND CONCERNS

Outstanding Issues

1. Use a consultant to research the use and locate the "best-fit" and stable Appl. - 11/19/99
2. Physician Table - Mike to follow up with Beech Street / Capp Care - 11/19/99
3. Get copy of documented procedures in the Banana - David 11/19/99 (Target to walkthrough 11/30)
4. Pill Bottle Design: Client machine and Web Server - David to write up procedure 11/19/99
5. Group to review CareHelper.com Overview and forward feedback to Janice through email - 12/06/99
6. Serial Devices Needed for David to finalize development and test:
   - Blood Glucose - pending new model (next week 11/23)
   - Pill Bottle - This week 11/19
   - Blood Pressure Monitor - David has already
7. Trend graphs
   - Need a list of graphs
   - Need a final design
   - David take a stab and Eric get a clinician to review and make final recommendations

Completed Items:

- Where should the system Messages be displayed on the screen.: Display at top of screen, above screen title and below Top Menu Bar, and roll the screen down to make room for message
- To notify a nurse of all field changes, managed through a Nurse_Event_Log
- Display the term "Caregiver" as "Care**Giver**" with the "G" capitalized and "**Giver**" in bold where the term is used.
- Highlight all required fields that have not been completed in Red. (might impact performance, need to follow up with validation testing)

CareHelper.com
Site Overview

Family caregivers comprise the largest contingent of people caring for elderly persons. Without a doubt, family caregivers are dedicated and loving people. At times, however, the task of caring for an elderly family member becomes overwhelming. In addition, the demands of family and the workplace must be considered, along with the personal needs of the caregiver. CareHelper.com is dedicated to helping family caregivers find that needed balance in their lives.

The goals at CareHelper.com are:

- Provide family caregivers with information, resources, and support.

By using the site's CareGuide, family caregivers can access information about legal and financial issues. The guide's Caregiving Skills Section provides information about caregiving tasks such as bathing and grooming, home and environmental safety assessment, medication compliance, and looking out for depression. A key component of CareGuide is the Caregiver Support Section, where family caregivers can find out about stress and its relief, and how to avoid the burnout so commonly associated with family caregiving. Each section of CareGuide provides links to informational and supportive resources available on other high-quality websites. We have pulled together the critical aspects of caregiving to provide a comprehensive Internet information base for family caregivers.

- Provide family caregivers with the tools to organize their busy lives.

Users of CareHelper.com will find a variety of resources designed to help alleviate stress through organization. By completing the worksheets, caregivers will be able to customize a personal care organizer in which all information related to care recipients' medical history, physicians, medications, pharmacies, and insurance can be brought together in one place. Users will also be provided with a calendar and personal planner to keep track of appointments and important events. A Shopping Manager will allow caregivers to record needed medications, supplies, and personal items. This list can be organized by store, and the caregiver can print it out when they plan to go shopping.

- Provide peace of mind through the use of Remote Monitoring Technology.

Did Dad take his blood pressure medication? Will Mom remember to check her blood glucose? These are common worries among family caregivers. CareHelper.com seeks to alleviate such worries through the introduction of remote monitoring medical devices. For example, Dad's blood pressure medication may be stored in CareHelper's pill bottle device. An alarm will sound at the time the medication is to be taken. If the bottle is opened, the device will transmit a signal to the in-home base station. This information will be downloaded to CareHelper.com's database. The caregiver can request reports to track compliance, and can compare Dad's pill-taking behavior with his actual blood pressure as measured with CareHelper's blood pressure device. CareHelper.com is also developing remote monitoring devices to track blood glucose, weight, and body temperature.

- Provide feedback from home health professionals.

In addition to the reports that can be generated by the caregiver, CareHelper.com has utilized computer video technology to generate periodic reports delivered by the care recipient's home health care professional. These videotaped sessions will take the caregiver through the reports step-by-step. They can be viewed at any time - even while the caregiver is at work.

STANDARDS DEFINITION

CareHelper.com Home Page Top Menu Bar: navigates with drop down selection lists

TOP MENU	**Home**	**Login**	**CareHelper Guide**	**About Us**	**Contact Us**	**Site Map**

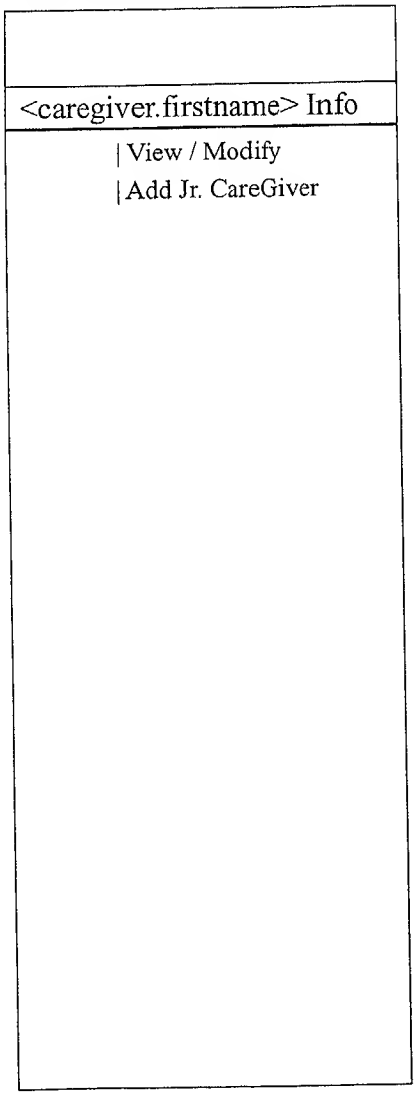
CareGiver Page Top Menu Bar -navigates with drop down selection lists

TOP MENU	**Home**	**Janice's Organizer** **| Calendar** **| My Personal Diary** **| InBox** **| Care List** **| My Account**	**Shopping Manager** **| View/Modify** **| Print**	**CareHelper Guide**	**Contact Us**

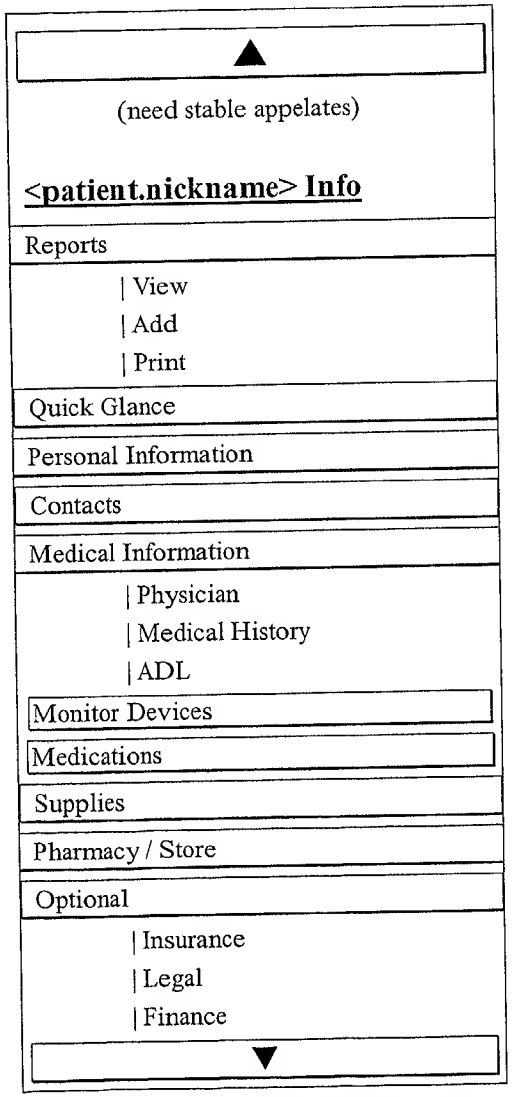
New CareGiver Registration Top Menu Bar: navigates with drop down selection lists - Terry to complete design

TOP MENU	**Home**	**Benefits of Membership**	**Join Now**	**TBD**	**Contact Us**

CareGiver Page
Left Column Menu Bar

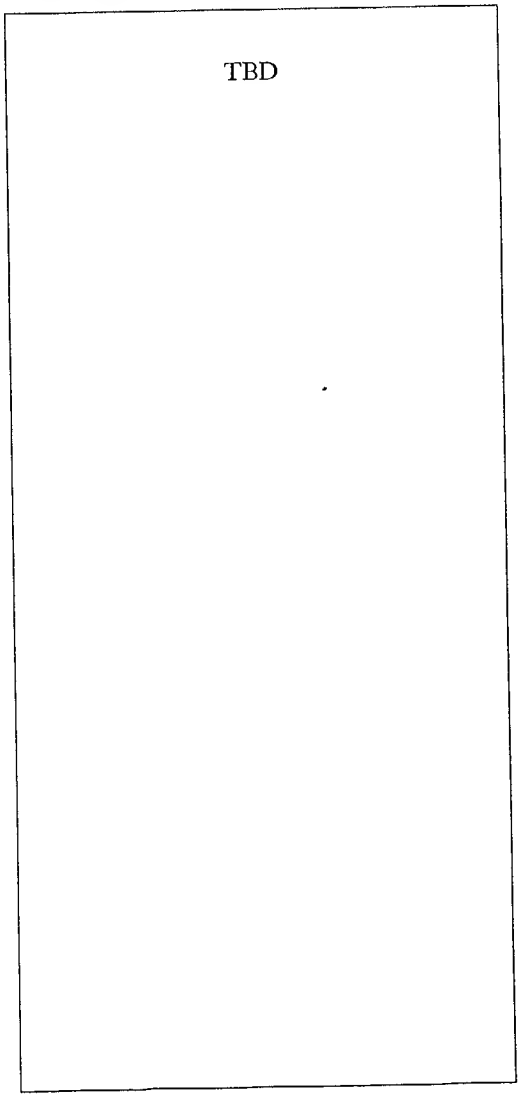


CareGiver - Care Recipient
Left Column Menu Bar



Note scrolling bars appear only when needed

Shopping Manager
Left Column Menu Bar



Screen Name: 1.0 Home Page / Login

Screen Design Layout: Note: The screen design layout does not represent the Graphic Design nor the font selection and size.

TOP MENU **Home** **CareHelper Guide** **About Us** **Contact Us** **Site Map**

< Error Messages Screen Area· Text to be displayed in red>

Welcome to CareHelper.com

LEFT COLUMN MENU

Enter your Care**Giver** User Name and Password.

New Care**Giver** Member Registration

* Care**Giver** User Name <*caregiver.username*>

* Password <*caregiver.password* >

☑ (Save my password)

[Continue] [Reset]

Legend: * Indicates required field entry; <*table.field name*> defines field entry; [buttons] represents screen buttons;

Screen Name: 1.0 Home Page / Login

Technical Notes:

- **Screen Title:** CareHelper Home Page. Display "Welcome to CareHelper.com"
- **Screen Design:** TBD
- **Screen Goal:** Present overview of business, services and products and also gather the minimum amount of information needed in order to login the CareGiver.
- **Design approach:** Intended to be user friendly, intuitive with personalized instructions and greetings.
- **Screen Access:** Initial page display when visiting web site: CareHelper.com and when selecting Home Page
- **Screen Top Menu Bar:** CareHelper Top Menu Bar
- **Screen Left Column Menu Bar:** Blank
- **Table Access:** 1) Caregiver Table (Read)
- **Screen Defaults:** Display saved User name and saved password as '****" if Saved Password field was checked.
- **Required Fields:** See indicator * by the fields for required field entry for successful processing.
- **Screen Buttons:**
  - Continue **- will process screen info**
  - Reset **- will clear fields and reset to defaults**
  - New Member Registration **- will go to Screen Name: 2.0 New Member Registration**
- **Special Processing:**
  - When first displaying window fields: If Saved Password is checked default the password and display '***'. If Saved Password is not checked do not default the display of the password.
- **Screen processing:**
  - [Continue] key processing: Confirm Password' field with User login.
    - If a match, continue to the CareGiver Page
    - If not valid, display the error message "Your Password is not valid, please reenter your password".

Screen Name: 2.0 New CareGiver Registration

Screen Design Layout: Note: The screen design layout does not represent the Graphic Design nor the font selection and size.

TOP MENU **Home** **Benefits of Membership** **Join Now** **TBD** **Contact Us**

< Error Messages Screen Area· Text to be displayed in red>

New Care**Giver** Registration

Just a few questions, and you are registered!

* **CareGiver First Name** <*caregiver.firstname* >
* **CareGiver Last Name** <*caregiver.lastname* >
* **CareGiver Birth Date** <*caregiver.birthdate* > **[mm/dd/yyyy]**
* **CareGiver Email Address** <*caregiver.email1* >

Please check your Email Address! The confirmation of your registration will be sent to this address.

Choose your Care**Giver** User Name and Password. This will identify you in CareHelper.com

* **CareGiver User Name** <caregiver.username >

☐ **(Save my User Name, so I don't have to remember it each time I login)**

Some CareHelper Registered-Only features will require a password. It must be at least 4 characters, and something you can remember easily. Enter your password here, and the re-type it to confirm.

* **Password** <caregiver.password >
* **Confirm Password** <caregiver.password >

☐ **(Save my password, so I don't have to remember it each time I login)**

Just one more thing,

As a registered Care**Giver** of CareHelper.com, you agree to abide by our Terms of Use. Please read the following Terms of Use before submitting your information.

[I accept / Submit] **[Reset]** **[Return to Home Page]**

Legend: * Indicates required field entry; <*table.field name*> defines field entry; [buttons] represents screen buttons;

Screen Name: 2.0 New CareGiver Registration

Technical Notes:

- **Screen Title:** New Care**Giver** Registration (display title: Note special font bolding of "Giver")
- **Screen Design**: Template was based on the membership registration screen from www.webofcare.com web site.
- **Screen Goal**: Gather the minimum amount of information needed in order to register the CareGiver.
- **Design approach**: Intended to be user friendly, intuitive with personalized instructions and greetings.
- **Screen Issues:**
- **Screen Access**: From CareHelper Home Page
- **Screen Top Menu Bar:** New Caregiver Registration Top Menu Bar - navigates with drop down lists.-(Note: TBD by Terry)
- **Screen Left Column Menu Bar:** Blank
- **Table Access:** 1) Caregiver Table (Read/Write)
- **Screen Defaults**: none
- **Required Fields:** See screen for required fields for successful registration.
- **Screen Buttons:** I Accept; Reset; Return to Home Page; Continue
- **Special Processing:**
    - Highlight all require fields which have not been completed in red.
    - Only show '*' for each character enter into the password and confirm password fields.
    - Save Username and redisplay on login screen, each time user logs in.
    - If "save password" is selected, default the saved password on the login screen.
    - Process after the selection of the [I accept / Submit form] key:
        - Verify 'CareGiver First and Last Name' combined, are a unique entry.
        - 'Confirm Password' field must match the 'Password' field entry. If fields do not match, clear both fields and request the user to reenter the password with the message:

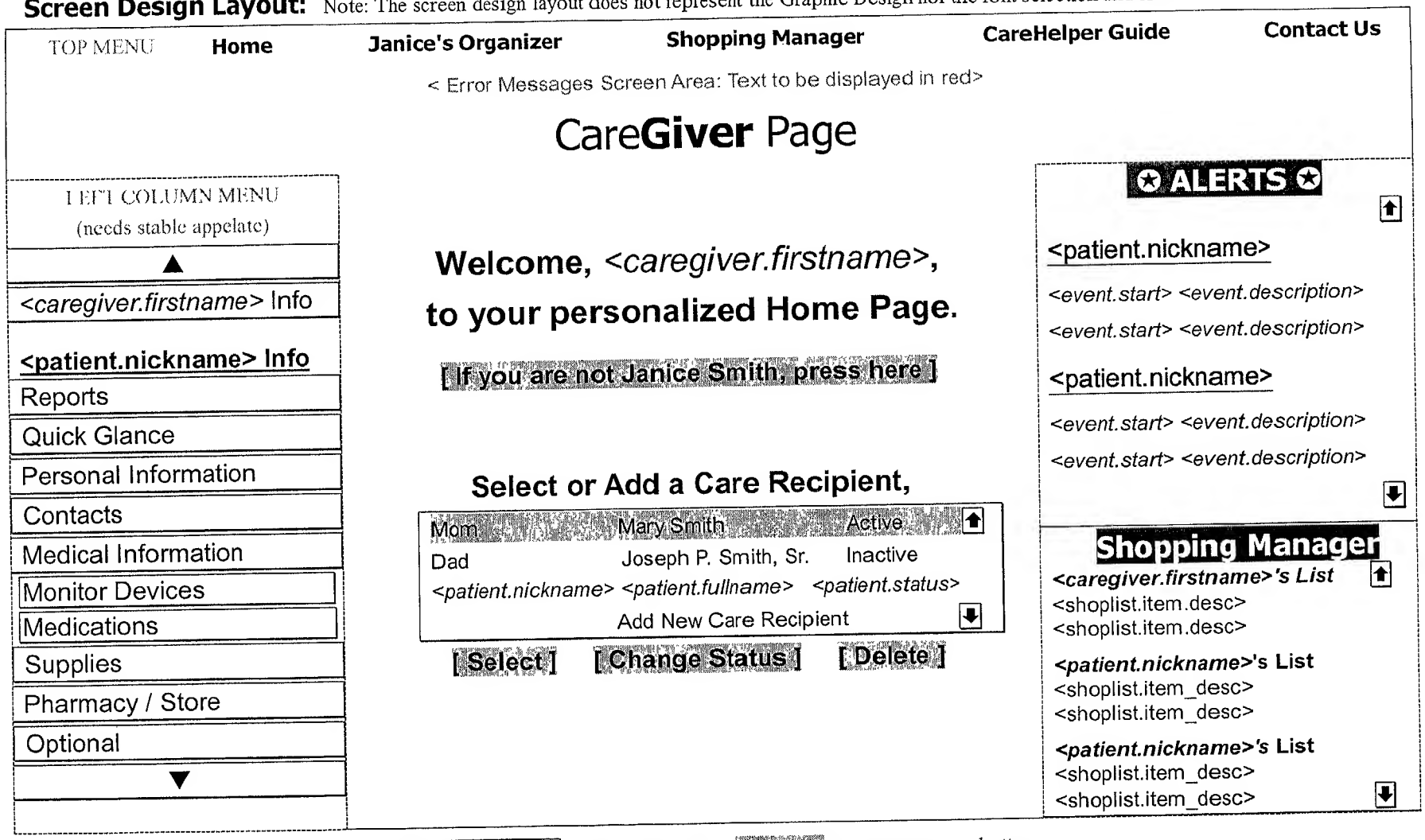
          "Your Confirmed Password does not match your Password, please reenter your password".
        - Restrict Password to be a minimum of 4 characters.
- **Screen processing:**
    - [I accept Submit Form]: After successful registration processing:
        - Display a clear screen with the Top Menu Bar and display the following statement in the <error messages and message screen area>:

          "Welcome, <caregiver.firstname> as a registered Care**Giver** with CareHelper.com"
    - Display the buttons **Continue** and **Return to CareHelper Home Page**.
    - [Reset form]: The Reset Form key will clear all fields on the screen and place the cursor back at the top of the screen.

- Unsuccessful registration: After selecting the [I accept/ Submit form] key, reject the registration for the following reasons and display the following statement in the <error messages and message screen area>:
- "We were unable to register you as a Care**Giver** with CareHelper, because you are already a registered Care**Giver**"
- "Password cannot be less than 4 characters. Please try again"
- "We were unable to register you as a Care**Giver** with CareHelper.com. Please complete entry for the following fields" (highlight the fields in Red)

Screen Name: 3.0 CareGiver Page

Screen Design Layout: Note: The screen design layout does not represent the Graphic Design nor the font selection and size.



Legend: * Indicates required field entry; <*table.field name*> defines field entry; [buttons] represents screen buttons;

Screen Name: 3.0 CareGiver Page

Technical Notes:

- **Screen Title:** Care**Giver** Page (display title)
- **Screen Design:**
  - Allow a CareGiver to have more than one Care Recipient, initially two.
  - Have important patient specific alerts presented to the CareGiver for immediate follow up.
  - Easily see the Care Recipient information options available on the Left Column Menu Bar.
  - The Top Menu bar was designed to assist the CareGiver manage their day, time, personal items, mail, account and help coordinate multiple Care Recipients.
- **Screen Goal**: With minimum effort, CareGiver can quickly see priority patient follow up items, still access their calendar and personal info and easily access the navigational menu bar to quickly get to the patient specific information.
- **Design approach**: Intended to be user friendly, intuitive with personalized instructions and greetings.
- **Issues/Concerns:**
- **Top Menu Bar:** Caregiver Recipient Top Menu Bar (drop down selection)
- **Left Column Menu Bar:** 1) CareGiver Page Left Column Menu Bar (Shift menu navigation); 2) CareGiver - Care Recipient Left Menu Bar
- **Right Column Frame:** Alert events, in a scroll box. Alerts by patient . Shopping Manager frame.
- **Table Access:** 1) Caregiver Table (Read), 2) Patient Table (Read), 3) Events (Read)
- **Screen Buttons:** If you are not Janice Smith, press here; Select, Change Status, Delete
- **Screen Defaults**:
  - Default the first patient in the CareGiver list of patients as selected when the window is first displayed and no prior Care Recipients have been selected.
  - Display the defaulted patient's nicknames in the Left Column Menu Bar. If no nicknames exist for the Care Recipient, display the <patient.firstname> instead.
  - If a CareGiver has no Care Recipients entered, then:
    - Do not display a Care Recipients Nickname on the Left Column Menu Bar
    - Display an empty Alert Box on the Right Column Frame
    - Display the Shopping Manager box if empty (ie. could have CareGiver only shopping items if no Care Reciepient has been entered.
    - Only display CareGiver Page Left Menu Bar, do not display Care Recipient Left Menu Bar
    - Only Display the buttons: [If you are not <caregiver.firstname> <caregiver.lastname>, press here]
- **Required Fields:** na

Technical Notes: ... continued)

- **Special Processing:**
  - If a Care Recipient for the Registered CareGiver has already been selected then each time they return to this page display the Care Recipient Nickname on the Left Column Menu Bar. (Default to Care Recipient first name, if there is no nickname)
  - Display all of the Care Recipients and their associated Alert events for a CareGiver in the Alert scrolling box.
- **Screen Processing:**
  - After the Care Recipient has been highlighted and selected access the Care Recipient from the Patient Table, return to the CareGiver Page, display the <patient.nickname> over the Left Column Menu Bar. Display the buttons associated with more than one patient.
  - After the New Care Recipient has been highlighted and selected go directly to the Add Care Recipient screen and display cleared fields ready for entry.

Screen Name: 3.1 Caregiver Personal Information

Screen Layout Design:

TOP MENU **Home** **Janice's Organizer** **Shopping Manager** **CareHelper Guide** **Contact Us**

< error messages screen area >

<caregiver.nickname>'s Personal Information

[Change Password]

Please complete the following information and bring the information current:

***First Name**	<caregiver.firstname >	***Last Name**	<caregiver.lastname>
Nickname	<caregiver.nickname >	***Birth Date**	<caregiver.birthdate> (mm/dd/yyyy)
Gender	<caregiver.gender >		
Address	<caregiver.address1 > <caregiver.address2 >		
City	<caregiver.city >		
State	<caregiver.state >	**Zip Code**	<caregiver.zip >
Day Phone	<caregiver.homephone>	**Mobile Phone**	<caregiver.mobile >
Evening Phone	<caregiver.workphone >		
Fax Phone	<caregiver.pagerno >	**Email**	<caregiver.email >
Primary Language	<caregiver.language1 >	**Secondary Language**	<caregiver.language2>

Notes: _____

[Save and Continue] [Finish Later] [Do not Save]

Screen Name: 3.1 CareGiver Personal Information

Technical Notes:

- **Screen Title:** CareGiver Information (display title with CareGiver First name to personalize the window)
- **Screen Design:** Formatted similar to other system screens, where information that is logical grouped is placed on single screens. The user is still allowed to exit the screen without changing information. Screen layout still needs to be finalized.
- **Screen Goal**: Allow a CareGiver to enter a minimum set of information.
- **Design approach**: Intended to be user friendly, intuitive with personalized instructions and greetings.
- **Screen Access**: CareGiver Page-Recipient Left Bar Menu; Directly from the New CareGiver Information [Continue] Key
- **Top Menu Bar:** CareGiver Page Top menu Bar
- **Left Column Menu Bar:** [Change Password] access
- **Table Access:** 1) Caregiver Table (Read)
- **Required Fields:** see screen for identified fields with *
- **Default Fields:** If no nickname is added, default first name for nickname.
- **Drop Down Box:** State field is selected through a drop down box, first letter typed and go directly to that position in the list
- **Screen processing:**
    - Following the [Save and Continue] key selection, save the entered information into the CareGiver Table and go to the next sequence screen.
    - Following the [Return Later] key selection, save the entered information into the CareGiver Table and return to CareGiver Page 3.0
    - Following the [Do not save] key selection, do not save the entered information and return to CareGiver Page 3.0.
    - If the user tries to leave the screen without selecting one of the three button, give an error message

" xxxxxxx"

Screen Name: 4.0.1 Add New Care Recipient

Screen Layout Design:

TOP MENU **Home** **Janice's Organizer** **Shopping Manager** **CareHelper Guide** **Contact Us**

< error messages screen area >

Add New Care Recipient

PROCESS STEPS

- Add New Care Recipient
- Personal Information
- Emegency Contact Information
- Medical Information
- Monitor Devices
- Medications
- Supplies
- Pharmacy / Store
- Reports

Welcome, <caregiver.firstname>,

Please complete the following information about the Care Recipient:

*** First Name** <patient.firstname>

*** Last Name** <patient.lastname>

*** Nickname** <patient.nickname> (eg. Mom, Dad. Nana, Patti, etc.)

*** Birth Date** <patient.birthdate > (mm/dd/yyyy)

*** Gender** <patient.gender >

Add New Care Recipient **Do not add, Return to CareGiver Page**

Screen Name: 4.0.1 Add New Care Recipient

Technical Notes:

- **Screen Title:** Add New Care Recipient
- **Screen Design:** Formatted similar to other system screens, to have information easily entered and still allow the user to exit the screen without adding a Care Recipient.
- **Screen Goal**: Allow a CareGiver to enter a minimum set of information, in order to add a Care Recipient
- **Design approach**: Intended to be user friendly, intuitive with personalized instructions and greetings.
- **Top Menu Bar:** Caregiver Top menu Bar
- **Left Column Menu Bar:** Process Steps
- **Table Access:** 1) Caregiver Table (Read), 2) Patient Table (Write)
- **Required Fields:** see screen for identified fields
- **Screen processing:**
    - Following the [Add New Care Recipient] key selection, and a successful processing, add the information to the Patient Table and go to the Care Recipient Information Screen.
    - If Care Recipient Firstname is the same as CareGiver Firstname, display a message to recommend a nickname.
    - Unsuccessful add: After selecting the [Add New Recipient] key, reject the add for the following reasons and display the message at the bottom of the screen:
        - "We were unable to add the Care Recipient, because the person already exists in the CareHelper.com. "
        - "We were unable to add the Care Recipient. Please complete entry for the following fields: List the fields."
    - Following the [Do not add, Return to CareGiver Page] key selection, return to the CareGiver Page

Screen Name: 4.1 Care Recipient Personal Information

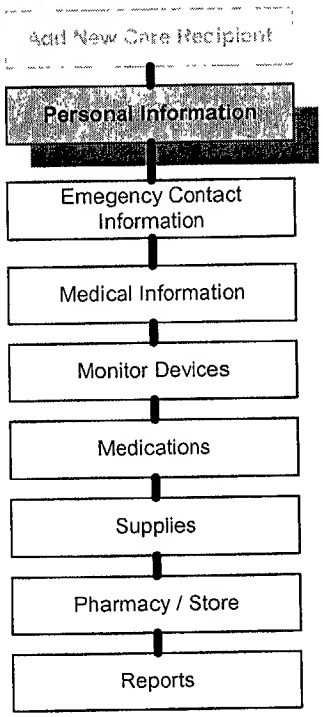
Screen Layout Design:

TOP MENU **Home** **Janice's Organizer** **Shopping Manager** **CareHelper Guide** **Contact Us**

< error messages screen area >

<patient.nickname>'s Personal Information

PROCESS STEPS



Please complete the following information about <patient.nickname> and bring the information current:

***First Name**	<patient.firstname >	***Last Name**	<patient.lastname>
Nickname	<patient.nickname >	***Birth Date**	<patient.birthdate> (mm/dd/yyyy)
Gender	<patient.gender >	***SSN**	<patient.ssn > (123-45-6789)
Address	<patient.address1 >		
	<patient.address2 >		
City	<patient.city >		
State	<patient.state >	**Zip Code**	<patient.zip >
Day Phone	<patient.phone1 >	**Evening Phone**	<patient.phone2 >
Mobile Phone	<patient.mobile >		
Pager No.	<patient.pagerno >	**Notification Email**	<patient.email >
Primary Language	<patient.language1 >	**Secondary Language**	<patient.language2>

Notes: _____

[Save and Continue] **[Finish Later]** **[Do not Save]**

Screen Name: 4.1 Care Recipient Personal Information

Technical Notes:

- **Screen Title:** Care Recipient Information (display title with Care Recipient First name to personalize the window)
- **Screen Design:** Formatted similar to other system screens, where information that is logical grouped is placed on single screens. The user is still allowed to exit the screen without changing information. Screen layout still needs to be finalized.
- **Screen Goal**: Allow a CareGiver to enter a minimum set of information.
- **Design approach**: Intended to be user friendly, intuitive with personalized instructions and greetings.
- **Screen Access**: CareGiver Page-Recipient Left Bar Menu; Directly from the New Care Recipient Information [Continue] Key
- **Top Menu Bar:** Caregiver Page Top menu Bar
- **Left Column Menu Bar:** 1) CareGiver Page Left Column Menu Bar; 2) CareGiver - Care Recipient Left Menu Bar
- **Table Access:** 1) Caregiver Table (Read), 2) Patient Table (Write),
- **Required Fields:** see screen for identified fields
- **Default Fields:** If no nickname is added, default first name for nickname.
- **Drop Down Box:** State field is selected through a drop down box, first letter typed and go directly to that position in the list
- **Screen processing:**
    - Following the [Save and Continue] key selection, save the entered information into the Patient Table and go to the next sequence screen.
    - Following the [Return Later] key selection, save the entered information into the Patient Table and return to CareGiver Page.
    - Following the [Do not save] key selection, do not save the entered information and return to CareGiver Page.
    - If the user tries to leave the screen without selecting one of the three button, give an error message

" xxxxxxx"

Screen Name: 4.2 Care Recipient Emergency Contact Information

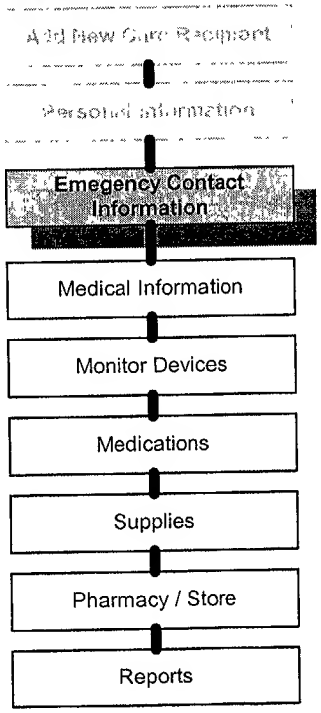
Screen Layout Design:

TOP MENU **Home** **Janice's Organizer** **Shopping Manager** **CareHelper Guide** **Contact Us**

< error messages screen area >

<patient.nickname>'s Emergency Contact Information

PROCESS STEPS



Please select an Emergency Contact and complete the following information:

Select or Add an Emergency Contact,

Primary Contact Order	Name	Relationship
1)	Tom Comings	Son
2)	Judith Comings	Neighbor
New Contact		

*** Contact Order** <contacts.order > **, in case of an emergency**

First Name <contacts.firstname > **Last Name** <contacts.lastname>

Nickname <contacts.nickname > **Birth Date** <contacts.birthdate> (mm/dd/yyyy)

*** Relationship** <contacts.relationship >

*** Evening Phone** <contacts.home > *** Day Phone** <contacts.work >

Mobile Phone <contacts.mobile > **Pager No.** <contacts.pagerno >

Email <contacts.email >

Primary Language <contacts.language1 > **Secondary Language** <contact.language2>

Notes: (eg. Contact has security code for home) _____

[Save and Continue] [Finish Later] [Do not Save]

Screen Name: 4.2 Care Recipient Emergency Contact Information

Technical Notes:

- **Screen Title:** Care Recipient Contact Information (display title with Care Recipient First name to personalize the window)
- **Screen Design:** Formatted similar to other system screens, where information that is logical grouped is placed on single screens. The user is still allowed to exit the screen without changing information.
- **Screen Goal**: Allow a CareGiver to enter a minimum set of information.
- **Design approach**: Intended to be user friendly, intuitive with personalized instructions and greetings.
- **Screen Access**: CareGiver Page-Recipient Left Bar Menu; Directly from the Care Recipient Personal Information [Continue] Key
- **Top Menu Bar:** Caregiver Page Top menu Bar
- **Left Column Menu Bar:** 1) CareGiver Page Left Column Menu Bar; 2) CareGiver - Care Recipient Left Menu Bar
- **Table Access:** 1) Caregiver Table (Read), 2) Patient Table (Read), 3) Patient Contacts Table
- **Required Fields:** see screen for identified fields
- **Default Fields:** If no nickname is added, default first name for nickname. Default the CareGiver as the Primary Emergency Contact and allow update of the contact order.
- **Drop Down Box:** "Contact Order", "Distance From Patient" and "Contact Gender" fields are selected through a drop down box, first letter typed and go directly to that position in the list. See Tables Definition in the Appendix for field Drop Down Box values
- **Screen processing:**
    - When initially displaying window,
        - If there are no contacts entered, default to highlighting the "New Contact" and display the fields ready for a new contact Add
        - If there is only one contact entered, default to highlighting the one contact in the select box, and default the display of the contact in the fields
        - If more than one contact exists, display the contacts in the select box in Contact order, default to the last contact updated/entered and highlight and display in fields
    - Following the [Save and Continue] key selection, save the entered information into the Contacts Table and go to the next sequence screen.
    - Following the [Return Later] key selection, save the entered information into the Contacts Table and return to CareGiver Page.
    - Following the [Do not save] key selection, do not save the entered information and return to CareGiver Page.
    - If the user tries to leave the screen without selecting one of the three button, give an error message

" xxxxxxx"

Screen Name: 4.3.3 Care Recipient Physician Information

Screen Layout Design:

TOP MENU **Home** **Janice's Organizer** **Shopping Manager** **CareHelper Guide** **Contact Us**

< error messages screen area >

<patient.nickname>'s Medical - Physician Information

PROCESS STEPS

- Add New Care Recipient
- [illegible]
- Emergency Contact Information
- **Medical Information**
  - ADL
  - Medical History
  - **Physician**
- Monitor Devices
- Medications
- Supplies
- Pharmacy / Store
- Reports

Please select a Physician and complete the following information:

Select or Add a Physician,

Name	Specialty	Status
Tom Comings, M.D.	Geriatrics	Active
Sally Jones, M.D.	Geriatrics	Inactive
Add New Physician		

Status <physician.status >

[Search for Physician]

First Name <physician.firstname> **Last Name** <physician.lastname >

Office Contact <physician.contact >

Office Phone <physician.office > **Fax Number** <physician.fax >

Address <physician.address1>

<physician.address2>

City <physician.city >

State <physician.state > **Zip Code** <physician.zip >

Specialty 1 <physician.specialty1> **Other:** <physician.specialty1 >

Notes: _____

[Save and Continue] **[Finish Later]** **[Do Not Save]**

Screen Name: 4.3.3 Care Recipient Physician Information

Technical Notes:

- **Screen Title:** Care Recipient Medical - Physician Information (display title with Care Recipient First name to personalize the window)
- **Screen Design:** Formatted similar to other system screens, where information that is logical grouped is placed on single screens. The user is still allowed to exit the screen without changing information.
- **Screen Goal**: Allow a CareGiver to enter a minimum set of information.
- **Design approach**: Intended to be user friendly, intuitive with personalized instructions and greetings.
- **Screen Access**: CareGiver Page-Recipient Left Bar Menu; Directly from the Care Recipient Contactl Information [Continue] Key
- **Top Menu Bar:** Caregiver Page Top menu Bar
- **Left Column Menu Bar:** 1) CareGiver Page Left Column Menu Bar; 2) CareGiver - Care Recipient Left Menu Bar
- **Table Access:** 1) Caregiver Table (Read), 2) Patient Table (Read), 3) Patient Physician Table
- **Required Fields:** see screen for identified fields
- **Default Fields:** If no nickname is added, default first name for nickname.
- **Drop Down Box:** "Status", "Specialty 1" and "State" fields are selected through a drop down box, first letter typed and go directly to that position in the list. See Tables Definition in the Appendix for field Drop Down Box values
- **Screen processing:**
    - When initially displaying window,
        - If there are no physicians entered, default to highlighting the "New Physician" and display the fields ready for a new physician Add.
        - If there is only one physician entered, default to highlighting the one contact in the select box, and default the display of the physician in the fields
        - If more than one physician exists, display the physician in the select box in physician order, default to the last contact updated/entered and highlight and display in fields
    - [Search for Physician] button goes to the Search Physician search function, which searches a list of predefined physicians
    - Following the [Save and Continue] key selection, save the entered information into the physician table and go to the next sequence screen.
    - Following the [Return Later] key selection, save the entered information into the physician Table and return to CareGiver Page.
    - Following the [Do not save] key selection, do not save the entered information and return to CareGiver Page.
    - If the user tries to leave the screen without selecting one of the three button, give an error message

" xxxxxxx"

Screen Name: 3.2 Shopping Manager

Screen Design Layout: Design Option 1 Discussed

TOP ENU | Home | Janice's Organizer | Shopping Manager | CareHelper Guide | Contact Us

< error messages screen area >

Shopping Manager

[Print]
[Clear All]
[New Item]
[Sort]

Suggestions and Reminders

Date	Item		Person		Delete
11/23/1999	<item_description	>	<patient.nickname>	Add Now	☑
11/19/1999	<item_description	>	<patient.nickname>	Add Now	☑
11/18/1999	<item_description	>	<patient.nickname>	Add Now	☐
11/18/1999	<item_description	>	<patient.nickname>	Add Now	☐

<cargiver.firstname>'s List				Del
MedicationsDelete				
<item_description	>	<cg.location>	Add Now	☐
<item_description	>	<cg.location>	Add Now	☐
Supplies				
<item_description	>	<cg.location>	Add Now	☑
<item_description	>	<cg.location>	Add Now	☐
Other				
<item_description	>	<cg.location>	Add Now	☐
<item_description	>	<cg.location>	Add Now	☐

<patient.nickname>'s List				
Medications				
<item_description	>	<cg.location>	Add Now	☐
<item_description	>	<cg.location>	Add Now	☐
Supplies				
<item_description	>	<cg.location>	Add Now	☑

Current List

<caregiver.nickname>

Qty	Item	Delete
001	<shoplist.item_desc	☐
001	<shoplist.item_desc	☐
001	<shoplist.item_desc	☐
001	<shoplist.item_desc	☐

<patient.nickname>

Qty	Item	Delete
001	<shoplist.item_desc	☐
001	<shoplist.item_desc	☐
001	<shoplist.item_desc	☐
001	<shoplist.item_desc	☐
001	<shoplist.item_desc	☐
001	<shoplist.item_desc	☐
001	<shoplist.item_desc	☐
001	<shoplist.item_desc	☐

<patient.nickname>

Qty	Item	Delete
001	<shoplist.item_desc	☐
001	<shoplist.item_desc	☐

Screen Name: 3.2 Shopping Manager

Screen Design Layout: Design Option 2 Discussed

TOP MENU | Home | Janice's Organizer | Shopping Manager | CareHelper Guide | Contact Us

< error messages screen area >

Shopping Manager

Sort
Add Item
Go To

Add All to List | Buy

Suggestions and Reminders

Add to Shop List	Qty		Item		Person	Delete	Save for Later
☑	001	<	item_description		> <pt.nickname>	☐	☐
☑	001	<	item_description		> <pt.nickname>	☐	☐
<	reminder				> <pt.nickname>	☐	☐

Current Shopping List

Add to Shop List	Qty		Item		Location	Delete	Save for Later
<cargiver.firstname>'s List							
Medications							
☐	002	<	item_description	120 characters	> Rite Aid	☐	☐
☑	001	<	item_description		> <location >	☐	☐
Supplies							
☑	001	<	item_description		> <location >	☐	☐

Previous Shopping List

<patient.nickname>'s List							
Medications							
☑	001	<	item_description		> <location >	☐	☐
☑	001	<	item_description		> <location >	☐	☐
Supplies							
☑	001	<	item_description		> <location >	☐	☐

Screen Name: 3.2 Shopping Manager

Technical Notes:

- **Screen Title:** Shopping Manager (display title)
- **Screen Design:**
- **Screen Goal:**
- **Design approach**: Intended to be user friendly, intuitive with personalized instructions and greetings.
- **Top Menu Bar:** Caregiver Page Top menu Bar
- **Left Column Menu Bar:** Shopping Manager Left Menu Bar
- **Table Access:** 1) Caregiver Table (Read), 2) Patient Table (Read) 3) Shopping Manager
- **Required Fields:** n/a
- **Default Fields:** n/a
- **Drop Down Box:** n/a
- **Buttons: [Add All to list] [Sort] [Delete] [GoTo]**
- **Screen processing:**
    - Load the entire default Shopping Manager on initial window entry
    - Load the Suggestions and Reminders in the Suggestions area and sort by Person by Item
    - First time entering the window, display the Shopping Manager sorted by Caregiver list, Patient list. Within each list sort by Medications, Supplies and Other and within each subcategory sort by item.
    - If the user trys to leave the screen without selecting one of the three button, give an error message
    - If change Location is selected go to a new window (pop box) to process the change location for the item.
    - [Delete] key deletes the item from the list. The item is allowed to have zero quantity and still remain on the list
    - The check box indicates which items are to be purchased
    - [Add All to List] key checks off every item for future purchase
    - [Buy] key buys all checked off items for the indicated quantity and location. This becomes the final list and is added to the prior default list for future reference.
    - items are only removed from the default list and window if the item is deleted by using the delete key

Screen Name: 4.7 Monitor Device Set Up

Screen design Layout:

TOP MENU **Home** **Janice's Organizer** **Shopping Manager** **CareHelper Guide** **Contact Us**

< error messages screen area >

<patient.nickname>'s Monitor Device Set Up

Select or Add a Device,

Device	Collection Method
Pill Bottle	Auto
Blood Pressure	na
Blood Glucose	Auto
Body Weigh	Manual
Dose Pager	na
New Device	

Screen Name: 4.7.5 Pill Bottle Device Set Up

Screen design Layout:

TOP MENU **Home** **Janice's Organizer** **Shopping Manager** **CareHelper Guide** **Contact Us**

< error messages screen area >

<patient.nickname>'s Pill Bottle Device Set UP

Pill Bottle Set Up Instructions

Step 1:
Step 2:
Step 3:
....

Select a Medication for Pill Bottle Set UP

Medications	Dispense Method	Pill Bottle No.	Status
<patient.meds>	Pill Bottle	101	Active
<patient.meds>	Manual	na	Inactive
<patient.meds>	Pill Bottle	<pbottle.assignno>	<pbottle.status>
New Device			

<patient.meds>

Dispense Method Pill Bottle **Assigned Number** <pbottle.assignno>

Status <pbottle.status>

Pill Bottle Begin Date <pbottle.begindate> **Pill Bottle Stop Date** <pbottle.begindate>

Bottle Fill Days Supply <dayssupply> (i.e. number of pills placed in bottle for each fill)

Dosage *<medsdosage>* **Units** *<medsunits>*

Times per day *<medsinterval>* *or* ○ ***As Needed***

Set Daily Dosage Time: 12:15 AM **Alarm?** ● Yes ○ No

Set Daily Dosage Time: 12:15 AM **Alarm?** ● Yes ○ No

[Setup Pill Bottle] [Finish Later] [Refill] [Do Not Save]

Italic fields are display only (from medications set up screen)

TOP MENU **Home** **Janice's Organizer** **Shopping Manager** **CareHelper Guide** **Contact Us**

< error messages screen area >

<patient.nickname>'s Monitor Device Set Up

TBD

....

Select or Add Device,

Device	Collection Method
Weight /Temp Measure	Manual
Blood Pressure	na
Blood Glucose	Auto
New Device	

Weight/Temp

Please select the date for <patient.nickname>'s Weight/Temp Set Up and complete the information:

Weight/Temp <Date> <weight> [Add New Weight/Temp Measure]

Please complete the following information:

Measure Method Manual

Date <Date>

Weight Measure **<wmeasure>** **Range: High <weighthigh> Low <weightlow>**

Temp Measure **<tmeasure>** **Range: High <temphigh> Low <templow>**

[Save and Continue] **[Finish Later]** **[Do Not Save]**

CareHelper.com Design Document

12/10/99 Version

CareHelper.com Design Document

The purpose of this document is to formally document the design, development and user interface of the CareHelper system. This document is to be used to communicate between the Design, Development and QA team as to the requirements, design intent, identify any issues or concerns and document opportunities for future phase implementation.

The document includes:

- Overview CareHelper.com
- CareHelper Technology Architect Overview - Eric
- Recommended System Configuration / Minimum Requirements
- System Issues and Concerns
- Design, Development and QA Team
- System Standards
- Screen Process Flow
- Data Model
- Navigational / Menu Bar Description
- Graphic Screen Design
- Screen Layouts and Technical Notes
- Backup and Restore Procedures - David
- Disaster Recovery Procedures - Eric
- Version Control Procedures - David
- Test Procedures
  - Software Validation
  - Failure Mode Efficiency Analysis (FMEA) Matrix
- Appendix:
  - Table and Field Descriptions
  - Development Project Work Plan
  - Glossary of Terms

SYSTEM ISSUES AND CONCERNS

Outstanding Issues

1. Use a consultant to research the use and locate the "best-fit" and stable Appl. - 11/19/99
2. Physician Table - Mike to follow up with Beech Street / Capp Care - 11/19/99
3. Get copy of documented procedures in the Banana - David 11/19/99 (Target to walkthrough 11/30)
4. Pill Bottle Design: Client machine and Web Server - David to write up procedure 11/19/99
5. Group to review CareHelper.com Overview and forward feedback to Janice through email - 12/06/99
6. Serial Devices Needed for David to finalize development and test:
   - Blood Glucose - pending new model (next week 11/23)
   - Pill Bottle - This week 11/19
   - Blood Pressure Monitor - David has already
7. Trend graphs
   - Need a list of graphs
   - Need a final design
   - David take a stab and Eric get a clinician to review and make final recommendations

Completed Items:

- Where should the system Messages be displayed on the screen.: Display at top of screen, above screen title and below Top Menu Bar, and roll the screen down to make room for message
- To notify a nurse of all field changes, managed through a Nurse_Event_Log
- Display the term "Caregiver" as "Care**Giver**" with the "G" capitalized and "**Giver**" in bold where the term is used.
- Highlight all required fields that have not been completed in Red. (might impact performance, need to follow up with validation testing)

CareHelper.com
Site Overview

Family caregivers comprise the largest contingent of people caring for elderly persons. Without a doubt, family caregivers are dedicated and loving people. At times, however, the task of caring for an elderly family member becomes overwhelming. In addition, the demands of family and the workplace must be considered, along with the personal needs of the caregiver. CareHelper.com is dedicated to helping family caregivers find that needed balance in their lives.

The goals at CareHelper.com are:

- Provide family caregivers with information, resources, and support.

By using the site's CareGuide, family caregivers can access information about legal and financial issues. The guide's Caregiving Skills Section provides information about caregiving tasks such as bathing and grooming, home and environmental safety assessment, medication compliance, and looking out for depression. A key component of CareGuide is the Caregiver Support Section, where family caregivers can find out about stress and its relief, and how to avoid the burnout so commonly associated with family caregiving. Each section of CareGuide provides links to informational and supportive resources available on other high-quality websites. We have pulled together the critical aspects of caregiving to provide a comprehensive Internet information base for family caregivers.

- Provide family caregivers with the tools to organize their busy lives.

Users of CareHelper.com will find a variety of resources designed to help alleviate stress through organization. By completing the worksheets, caregivers will be able to customize a personal care organizer in which all information related to care recipients' medical history, physicians, medications, pharmacies, and insurance can be brought together in one place. Users will also be provided with a calendar and personal planner to keep track of appointments and important events. A Shopping Manager will allow caregivers to record needed medications, supplies, and personal items. This list can be organized by store, and the caregiver can print it out when they plan to go shopping.

- Provide peace of mind through the use of Remote Monitoring Technology.

Did Dad take his blood pressure medication? Will Mom remember to check her blood glucose? These are common worries among family caregivers. CareHelper.com seeks to alleviate such worries through the introduction of remote monitoring medical devices. For example, Dad's blood pressure medication may be stored in CareHelper's pill bottle device. An alarm will sound at the time the medication is to be taken. If the bottle is opened, the device will transmit a signal to the in-home base station. This information will be downloaded to CareHelper.com's database. The caregiver can request reports to track compliance, and can compare Dad's pill-taking behavior with his actual blood pressure as measured with CareHelper's blood pressure device. CareHelper.com is also developing remote monitoring devices to track blood glucose, weight, and body temperature.

- Provide feedback from home health professionals.

In addition to the reports that can be generated by the caregiver, CareHelper.com has utilized computer video technology to generate periodic reports delivered by the care recipient's home health care professional. These videotaped sessions will take the caregiver through the reports step-by-step. They can be viewed at any time - even while the caregiver is at work.

STANDARDS DEFINITION

CareHelper.com Home Page Top Menu Bar: navigates with drop down selection lists

TOP MENU	**Home**	**Login**	**CareHelper Guide**	**About Us**	**Contact Us**	**Site Map**

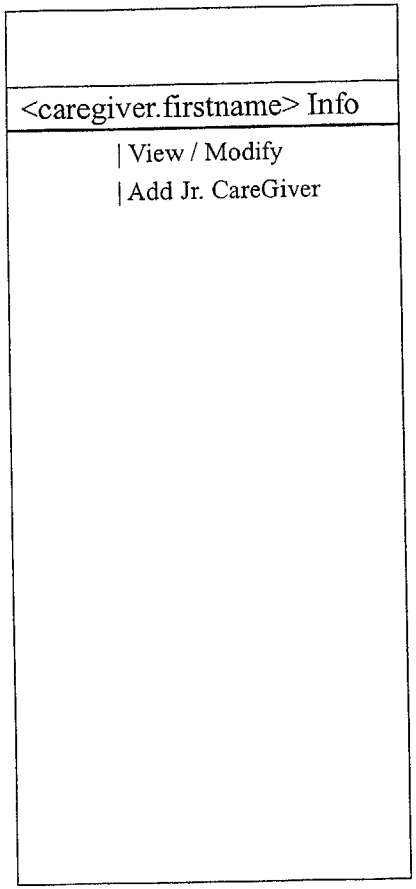
CareGiver Page Top Menu Bar -navigates with drop down selection lists

TOP MENU	**Home**	**Janice's Organizer** **| Calendar** **| My Personal Diary** **| InBox** **| Care List** **| My Account**	**Shopping Manager** **| View/Modify** **| Print**	**CareHelper Guide**	**Contact Us**

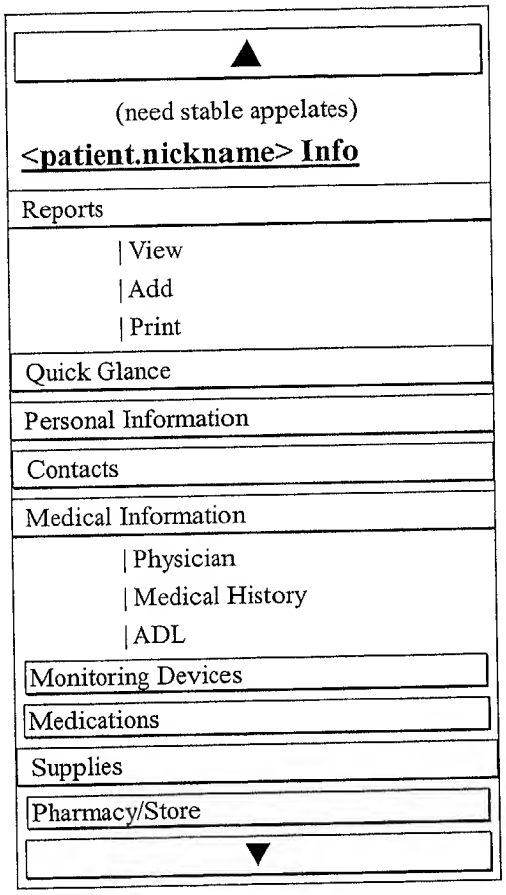
New CareGiver Registration Top Menu Bar: navigates with drop down selection lists - Terry to complete design

TOP MENU	**Home**	**Benefits of Membership**	**Join Now**	**TBD**	**Contact Us**

CareGiver Page
Left Column Menu Bar

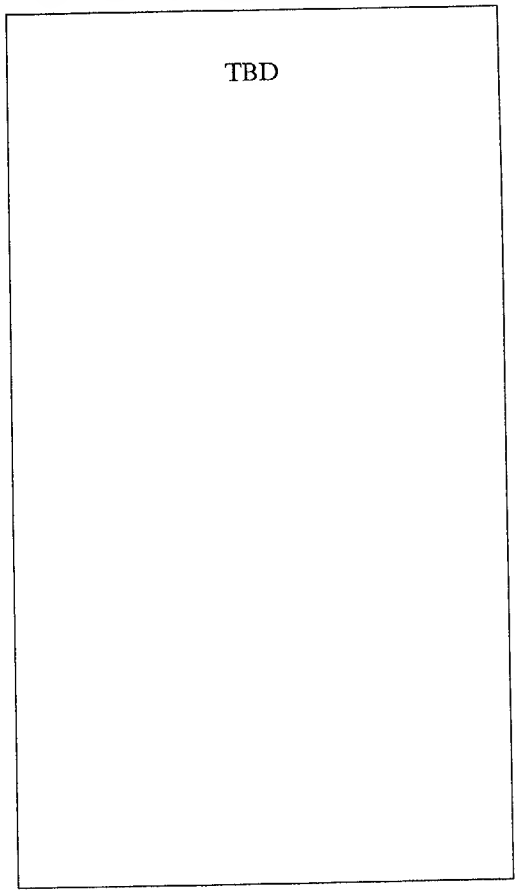


CareGiver - Care Recipient
Left Column Menu Bar



Note scrolling bars appear only when needed

Shopping Manager
Left Column Menu Bar



Screen Name: 1.0 Home Page / Login

Screen Design Layout: Note: The screen design layout does not represent the Graphic Design nor the font selection and size.

TOP MENU **Home** **CareHelper Guide** **About Us** **Contact Us** **Site Map**

< Error Messages Screen Area: Text to be displayed in red>

Welcome to CareHelper.com

LEFT COLUMN MENU

New CareGiver Member Registration

If you are already a CareHelper User, welcome back!
Please enter your CareGiver User Name and Password.

* CareGiver User Name <caregiver.username>
* Password <caregiver.password >
☑ (Save my password)

[Continue] [Reset] [Need Help with your Login]

** Indicates required field entry*

Legend: * Indicates required field entry; <table.field name> defines field entry; [buttons] represents screen buttons;

Screen Name: 1.0 Home Page / Login

Technical Notes:

- **Screen Title:** CareHelper Home Page. Display "Welcome to CareHelper.com"
- **Screen Design**: TBD
- **Screen Goal**: Present overview of business, services and products and also gather the minimum amount of information needed in order to login the CareGiver.
- **Design approach**: Intended to be user friendly, intuitive with personalized instructions and greetings.
- **Screen Access**: Initial page display when visiting web site: CareHelper.com and when selecting Home Page
- **Screen Top Menu Bar:** CareHelper Top Menu Bar
- **Screen Left Column Menu Bar:** Blank
- **Table Access:** 1) Caregiver Table (Read)
- **Screen Defaults**: Display saved User name and saved password as '****" if Saved Password field was checked.
- **Required Fields:** See indicator * by the fields for required field entry for successful processing.
- **Screen Buttons:**
  - Continue **- will process screen info**
  - Reset **- will clear fields and reset to defaults**
  - New Member Registration **- will go to Screen Name: 2.0 New Member Registration**
  - **[Need help with your Login and Password] - will go to a screen to make it possible for CareHelper to email to the user their correct User Name and Password [design update 12/1/0/99]**
- **Special Processing:**
  - When first displaying window fields: If Saved Password is checked default the password and display '****'. If Saved Password is not checked do not default the display of the password.
- **Screen processing:**
  - [Continue] key processing: Confirm Password' field with User login.
    - If a match, continue to the CareGiver Page
    - If not valid, display the following error message. -[design update 12/10/99]

      "Your Password is not valid, please reenter your password.

      If you need help with your login, please select [Need Help with Login and Password]"

Screen Name: 2.0 New CareGiver Registration

Screen Design Layout: Note: The screen design layout does not represent the Graphic Design nor the font selection and size.

TOP MENU **Home** **Benefits of Membership** **Join Now** **TBD** **Contact Us**

< Error Messages Screen Area: Text to be displayed in red>

New Care**Giver** Registration

Just a few questions, and you are registered!

* **CareGiver First Name** <*caregiver.firstname* >
* **CareGiver Last Name** <*caregiver.lastname* >
* **CareGiver Birth Date** <*caregiver.birthdate* > **[mm/dd/yyyy]**
* **CareGiver Email Address** <*caregiver.email1* >

Please check your Email Address! The confirmation of your registration will be sent to this address.

Choose your Care**Giver** User Name and Password. This will identify you in CareHelper.com

* **CareGiver User Name** <caregiver.username >

☐ **(Save my User Name, so I don't have to remember it each time I login)**

Enter your password and re-type it to confirm.* Indicates required field entry

* **Password** <caregiver.password > Your password must be at least 4 characters in length
* **Confirm Password** <caregiver.password >

☐ **(Save my password, so I don't have to remember it each time I login)**

Just one more thing,

As a registered Care**Giver** of CareHelper.com, you agree to abide by our Terms of Use. Please read the following Terms of Use before submitting your information.

** Indicates required field entry*

[I accept / Submit] **[Reset]** **[Return to Home Page]**

Legend: * Indicates required field entry; <*table.field name*> defines field entry; [buttons] represents screen buttons;

Screen Name: 2.0 New CareGiver Registration

Technical Notes:

- **Screen Title:** New Care**Giver** Registration (display title: Note special font bolding of "Giver")
- **Screen Design**: Template was based on the membership registration screen from www.webofcare.com web site.
- **Screen Goal**: Gather the minimum amount of information needed in order to register the CareGiver.
- **Design approach**: Intended to be user friendly, intuitive with personalized instructions and greetings.
- **Screen Issues:**
- **Screen Access**: From CareHelper Home Page
- **Screen Top Menu Bar:** New Caregiver Registration Top Menu Bar - navigates with drop down lists.-(Note: TBD by Terry)
- **Screen Left Column Menu Bar:** Blank
- **Table Access:** 1) Caregiver Table (Read/Write)
- **Screen Defaults**: none
- **Required Fields:** See screen for required fields for successful registration.
- **Screen Buttons:** I Accept; Reset; Return to Home Page; Continue
- **Special Processing:**
    - Highlight all require fields which have not been completed in red.
    - Only show '*' for each character enter into the password and confirm password fields.
    - Save Username and redisplay on login screen, each time user logs in.
    - If "save password" is selected, default the saved password on the login screen.
    - Process after the selection of the [I accept / Submit form] key:
        - Verify 'CareGiver First and Last Name' combined, are a unique entry.
        - 'Confirm Password' field must match the 'Password' field entry. If fields do not match, clear both fields and request the user to reenter the password with the message:

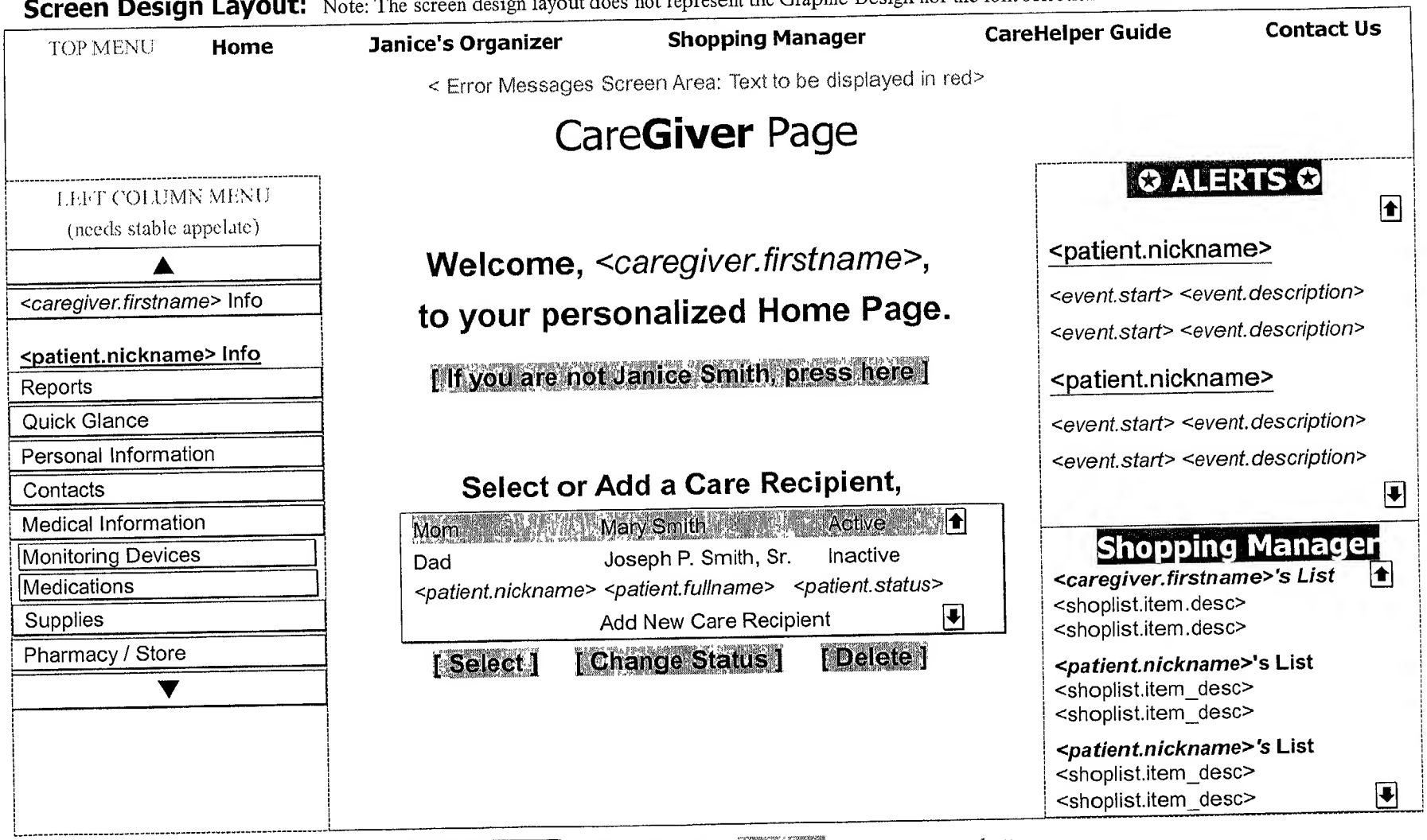
          "Your Confirmed Password does not match your Password, please reenter your password".
        - Restrict Password to be a minimum of 4 characters.
- **Screen processing:**
    - [I accept Submit Form]: After successful registration processing:
        - Display a clear screen with the Top Menu Bar and display the following statement in the <error messages and message screen area>:

          "Welcome, <caregiver.firstname> as a registered Care**Giver** with CareHelper.com"
    - Display the buttons **Continue** and **Return to CareHelper Home Page**.
    - [Reset form]: The Reset Form key will clear all fields on the screen and place the cursor back at the top of the screen.

- Unsuccessful registration: After selecting the [I accept/ Submit form] key, reject the registration for the following reasons and display the following statement in the <error messages and message screen area>:
- "We were unable to register you as a Care**Giver** with CareHelper, because you are already a registered Care**Giver**"
- "Password cannot be less than 4 characters. Please try again"
- "We were unable to register you as a Care**Giver** with CareHelper.com. Please complete entry for the following fields" (highlight the fields in Red)

Screen Name: 3.0 CareGiver Page

Screen Design Layout: Note: The screen design layout does not represent the Graphic Design nor the font selection and size.



Legend: * Indicates required field entry; <*table.field name*> defines field entry; [buttons] represents screen buttons;

Screen Name: 3.0 CareGiver Page

Technical Notes:

- **Screen Title:** Care**Giver** Page (display title)
- **Screen Design:**
  - Allow a CareGiver to have more than one Care Recipient, initially two.
  - Have important patient specific alerts presented to the CareGiver for immediate follow up.
  - Easily see the Care Recipient information options available on the Left Column Menu Bar.
  - The Top Menu bar was designed to assist the CareGiver manage their day, time, personal items, mail, account and help coordinate multiple Care Recipients.
- **Screen Goal**: With minimum effort, CareGiver can quickly see priority patient follow up items, still access their calendar and personal info and easily access the navigational menu bar to quickly get to the patient specific information.
- **Design approach**: Intended to be user friendly, intuitive with personalized instructions and greetings.
- **Issues/Concerns:**
- **Top Menu Bar:** Caregiver Recipient Top Menu Bar (drop down selection)
- **Left Column Menu Bar:** 1) CareGiver Page Left Column Menu Bar (Shift menu navigation); 2) CareGiver - Care Recipient Left Menu Bar
- **Right Column Frame:** Alert events, in a scroll box. Alerts by patient . Shopping Manager frame.
- **Table Access:** 1) Caregiver Table (Read), 2) Patient Table (Read), 3) Events (Read)
- **Screen Buttons:** If you are not Janice Smith, press here; Select, Change Status, Delete
- **Screen Defaults**:
  - Default the first patient in the CareGiver list of patients as selected when the window is first displayed and no prior Care Recipients have been selected.
  - Display the defaulted patient's nicknames in the Left Column Menu Bar. If no nicknames exist for the Care Recipient, display the <patient.firstname> instead.
  - If a CareGiver has no Care Recipients entered, then:
    - Do not display a Care Recipients Nickname on the Left Column Menu Bar
    - Display an empty Alert Box on the Right Column Frame
    - Display the Shopping Manager box if empty (ie. could have CareGiver only shopping items if no Care Reciepient has been entered.
    - Only display CareGiver Page Left Menu Bar, do not display Care Recipient Left Menu Bar
    - Only Display the buttons: [If you are not <caregiver.firstname> <caregiver.lastname>, press here]
- **Required Fields:** na

Technical Notes: ... continued)

- **Special Processing:**
  - If a Care Recipient for the Registered CareGiver has already been selected then each time they return to this page display the Care Recipient Nickname on the Left Column Menu Bar. (Default to Care Recipient first name, if there is no nickname)
  - Display all of the Care Recipients and their associated Alert events for a CareGiver in the Alert scrolling box.
- **Screen Processing:**
  - After the Care Recipient has been highlighted and selected access the Care Recipient from the Patient Table, return to the CareGiver Page, display the <patient.nickname> over the Left Column Menu Bar. Display the buttons associated with more than one patient.
  - After the New Care Recipient has been highlighted and selected go directly to the Add Care Recipient screen and display cleared fields ready for entry.

Screen Name: 3.1 Caregiver Personal Information

Screen Layout Design:

TOP MENU **Home** **Janice's Organizer** **Shopping Manager** **CareHelper Guide** **Contact Us**

< error messages screen area >

<caregiver.nickname>'s Personal Information

[Change My Password]

Please complete the following information and bring the information current:

***First Name**	<caregiver.firstname >	***Last Name**	<caregiver.lastname>
Nickname	<caregiver.nickname >	***Birth Date**	<caregiver.birthdate> (mm/dd/yyyy)
Gender	<caregiver.gender >		
Address	<caregiver.address1 > <caregiver.address2 >		
City	<caregiver.city >		
State	<caregiver.state >	**Zip Code**	<caregiver.zip >
***Day Phone**	<caregiver.homephone>	**Mobile Phone**	<caregiver.mobile >
***Evening Phone**	<caregiver.workphone >	**Pager No.**	<caregiver.pagerno >
Fax Phone	<caregiver.fax >	**Email**	<caregiver.email >
Primary Language	<caregiver.language1 >	**Secondary Language**	<caregiver.language2>

Notes: _____

** Indicates required field entry*

[Save and Continue] [Finish Later] [Do not Save]

Screen Name: 3.1 CareGiver Personal Information

Technical Notes:

- **Screen Title:** CareGiver Information (display title with CareGiver First name to personalize the window)
- **Screen Design:** Formatted similar to other system screens, where information that is logical grouped is placed on single screens. The user is still allowed to exit the screen without changing information. Screen layout still needs to be finalized.
- **Screen Goal**: Allow a CareGiver to enter a minimum set of information.
- **Design approach**: Intended to be user friendly, intuitive with personalized instructions and greetings.
- **Screen Access**: CareGiver Page-Recipient Left Bar Menu; Directly from the New CareGiver Information [Continue] Key
- **Top Menu Bar:** CareGiver Page Top menu Bar
- **Left Column Menu Bar:** [Change Password] access
- **Table Access:** 1) Caregiver Table (Read)
- **Required Fields:** see screen for identified fields with *
- **Default Fields:** If no nickname is added, default first name for nickname.
- **Drop Down Box:** State field is selected through a drop down box, first letter typed and go directly to that position in the list
- **Screen processing:**
    - Following the [Save and Continue] key selection, save the entered information into the CareGiver Table and go to the next sequence screen.
    - Following the [Return Later] key selection, save the entered information into the CareGiver Table and return to CareGiver Page 3.0
    - Following the [Do not save] key selection, do not save the entered information and return to CareGiver Page 3.0.
    - [Change My Password] will display a pop-up screen to allow the password to be changed and confirmed. After the password has been changed update the CareGiver Table and send an email to the CareGiver confirming the new password. [design update 12/10/99]
    - If the user tries to leave the screen without selecting one of the three button, give an error message

" xxxxxxx"

Screen Name: 4.0.1 Add New Care Recipient

Screen Layout Design:

TOP MENU **Home** **Janice's Organizer** **Shopping Manager** **CareHelper Guide** **Contact Us**

< error messages screen area >

Add New Care Recipient

PROCESS STEPS

- Add New Care Recipient
- Personal Information
- Emegency Contact Information
- Medical Information
- Monitor Devices
- Medications
- Supplies
- Pharmacy / Store
- Reports

Welcome, <caregiver.firstname>,

Please complete the following information about your Care Recipient:

*** First Name** <patient.firstname>

*** Last Name** <patient.lastname>

*** Nickname** <patient.nickname> (eg. Mom, Dad. Nana, Patti, etc.)

*** Birth Date** <patient.birthdate > (mm/dd/yyyy)

*** Gender** <patient.gender >

Add New Care Recipient **Do not add, Return to CareGiver Page**

** Indicates required field entry*

Screen Name: 4.0.1 Add New Care Recipient

Technical Notes:

- **Screen Title:** Add New Care Recipient
- **Screen Design:** Formatted similar to other system screens, to have information easily entered and still allow the user to exit the screen without adding a Care Recipient.
- **Screen Goal**: Allow a CareGiver to enter a minimum set of information, in order to add a Care Recipient
- **Design approach**: Intended to be user friendly, intuitive with personalized instructions and greetings.
- **Top Menu Bar:** Caregiver Top menu Bar
- **Left Column Menu Bar:** Process Steps
- **Table Access:** 1) Caregiver Table (Read), 2) Patient Table (Write)
- **Required Fields:** see screen for identified fields
- **Screen processing:**
    - Following the [Add New Care Recipient] key selection, and a successful processing, add the information to the Patient Table and go to the Care Recipient Information Screen.
    - If Care Recipient Firstname is the same as CareGiver Firstname, display a message to recommend a nickname.
    - Unsuccessful add: After selecting the [Add New Recipient] key, reject the add for the following reasons and display the message at the bottom of the screen:
        - "We were unable to add the Care Recipient, because the person already exists in the CareHelper.com. "
        - "We were unable to add the Care Recipient. Please complete entry for the following fields: List the fields."
    - Following the [Do not add, Return to CareGiver Page] key selection, return to the CareGiver Page

Screen Name: 4.1 Care Recipient Personal Information

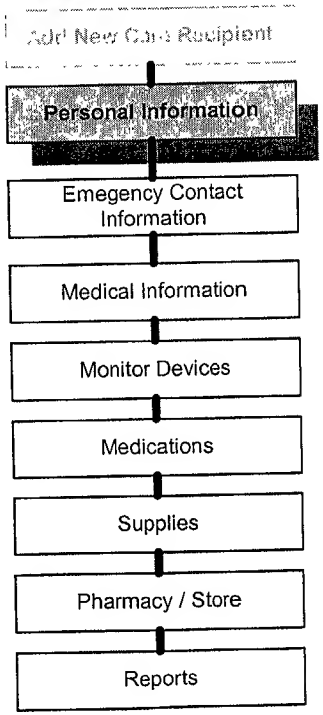
Screen Layout Design:

TOP MENU **Home** **Janice's Organizer** **Shopping Manager** **CareHelper Guide** **Contact Us**

< error messages screen area >

<patient.nickname>'s Personal Information

PROCESS STEPS



Please complete the following information about <patient.nickname> and bring the information current:

***First Name**	<patient.firstname >	***Last Name**	<patient.lastname>
***Nickname**	<patient.nickname >	***Birth Date**	<patient.birthdate> (mm/dd/yyyy)
***Gender**	<patient.gender >	**SSN**	<patient.ssn > (123-45-6789)
Address	<patient.address1 > <patient.address2 >		
City	<patient.city >		
State	<patient.state >	**Zip Code**	<patient.zip >
Day Phone	<patient.phone1 >	**Evening Phone**	<patient.phone2 >
Mobile Phone	<patient.mobile >		
Pager No.	<patient.pagerno >	**Notification Email**	<patient.email >
Primary Language	<patient.language1 >	**Secondary Language**	<patient.language2>

Notes:_____

** Indicates required field entry*

[Save and Continue] **[Finish Later]** **[Do not Save]**

Screen Name: 4.1 Care Recipient Personal Information

Technical Notes:

- **Screen Title:** Care Recipient Information (display title with Care Recipient First name to personalize the window)
- **Screen Design:** Formatted similar to other system screens, where information that is logical grouped is placed on single screens. The user is still allowed to exit the screen without changing information. Screen layout still needs to be finalized.
- **Screen Goal**: Allow a CareGiver to enter a minimum set of information.
- **Design approach**: Intended to be user friendly, intuitive with personalized instructions and greetings.
- **Screen Access**: CareGiver Page-Recipient Left Bar Menu; Directly from the New Care Recipient Information [Continue] Key
- **Top Menu Bar:** Caregiver Page Top menu Bar
- **Left Column Menu Bar:** 1) CareGiver Page Left Column Menu Bar; 2) CareGiver - Care Recipient Left Menu Bar
- **Table Access:** 1) Caregiver Table (Read), 2) Patient Table (Write),
- **Required Fields:** see screen for identified fields
- **Default Fields:** If no nickname is added, default first name for nickname.
- **Drop Down Box:** State field is selected through a drop down box, first letter typed and go directly to that position in the list
- **Screen processing:**
    - Display the information that has been previously entered for a New Care Recipient and for an existing Care Recipient. Allow the information to be updated.
    - Following the [Save and Continue] key selection, save the entered information into the Patient Table and go to the next sequence screen.
    - Following the [Return Later] key selection, save the entered information into the Patient Table and return to CareGiver Page.
    - Following the [Do not save] key selection, do not save the entered information and return to CareGiver Page.
    - If the user tries to leave the screen without selecting one of the three button, give an error message

" xxxxxxx"

Screen Name: 4.2 Care Recipient Emergency Contact Information

Screen Layout Design:

TOP MENU **Home** **Janice's Organizer** **Shopping Manager** **CareHelper Guide** **Contact Us**

< error messages screen area >

<patient.nickname>'s Emergency Contact Information

PROCESS STEPS

- Add New Care Recipient
- Personal Information
- **Emegency Contact Information**
- Medical Information
- Monitor Devices
- Medications
- Supplies
- Pharmacy / Store
- Reports

Please select an Emergency Contact and complete the following information:

Select or Add an Emergency Contact,

Primary Contact Order	Name	Relationship To Care Recipient
1)	Tom Comings	Son
2)	Judith Comings	Neighbor
New Contact		

*** Contact Order** <contacts.order > **, in case of an emergency**

First Name <contacts.firstname > **Last Name** <contacts.lastname>

Nickname <contacts.nickname > **Birth Date** <contacts.birthdate> (mm/dd/yyyy)

*** Relationship** <contacts.relationship > (i.e. Relationship to Care Recipient)

*** Evening Phone** <contacts.home > *** Day Phone** <contacts.work >

Mobile Phone <contacts.mobile > **Pager No.** <contacts.pagerno >

Email <contacts.email >

Primary Language <contacts.language1 > **Secondary Language** <contact.language2>

Notes: (eg. Primary Contact has security code for home) _____

** Indicates required field entry*

[Save and Continue] **[Finish Later]** **[Do not Save]**

Screen Name: 4.2 Care Recipient Emergency Contact Information

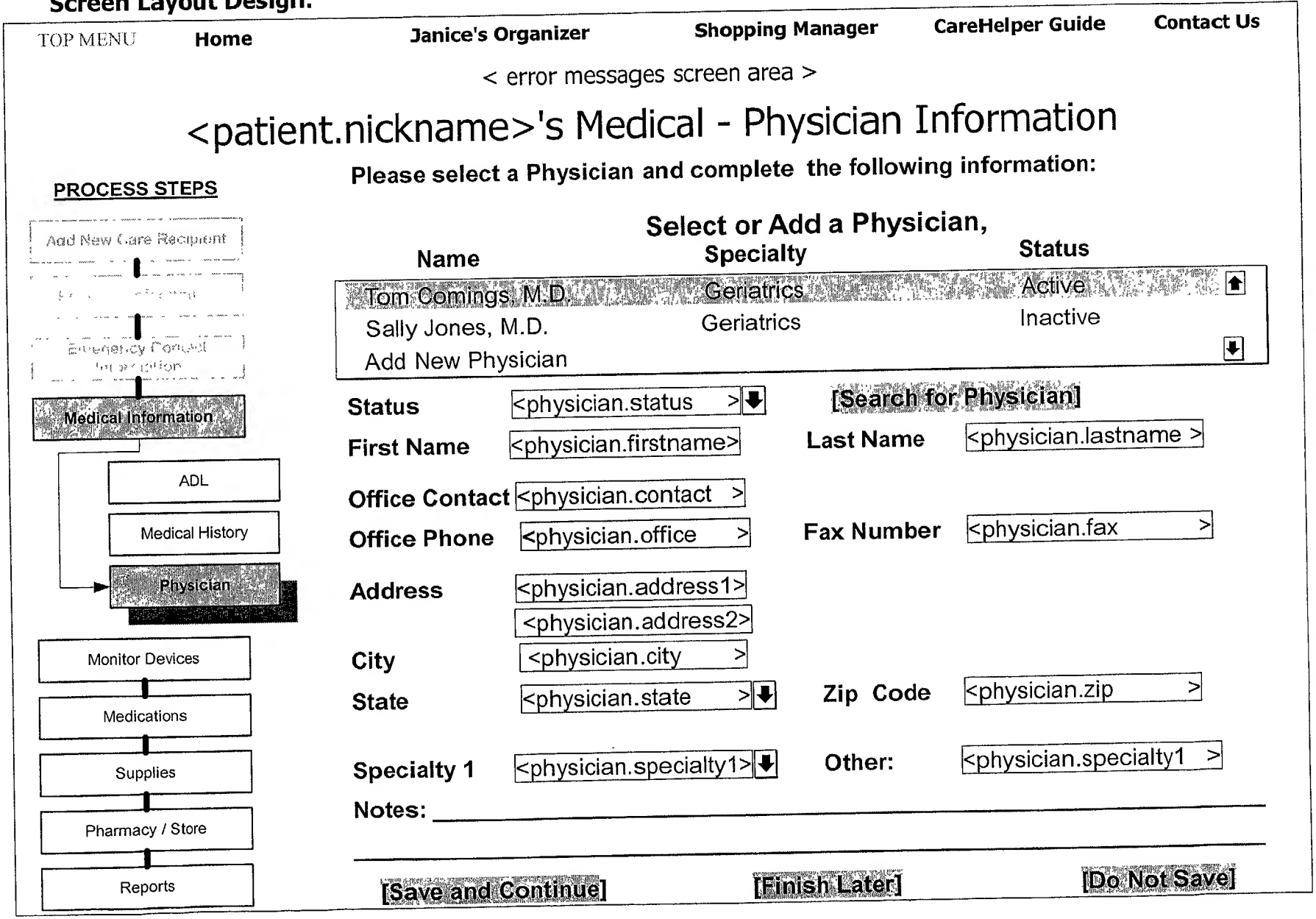
Technical Notes:

- **Screen Title:** Care Recipient Contact Information (display title with Care Recipient First name to personalize the window)
- **Screen Design:** Formatted similar to other system screens, where information that is logical grouped is placed on single screens. The user is still allowed to exit the screen without changing information.
- **Screen Goal**: Allow a CareGiver to enter a minimum set of information.
- **Design approach**: Intended to be user friendly, intuitive with personalized instructions and greetings.
- **Screen Access**: CareGiver Page-Recipient Left Bar Menu; Directly from the Care Recipient Personal Information [Continue] Key
- **Top Menu Bar:** Caregiver Page Top menu Bar
- **Left Column Menu Bar:** 1) CareGiver Page Left Column Menu Bar; 2) CareGiver - Care Recipient Left Menu Bar
- **Table Access:** 1) Caregiver Table (Read), 2) Patient Table (Read), 3) Patient Contacts Table
- **Required Fields:** see screen for identified fields
- **Default Fields:** If no nickname is added, default first name for nickname. Default the CareGiver as the Primary Emergency Contact and allow update of the contact order.
- **Drop Down Box:** "Contact Order" are selected through a drop down box, first letter/number typed and go directly to that position in the list. See Tables Definition in the Appendix for field Drop Down Box values
- **Screen processing:**
    - When initially displaying window,
        - Default the primary contact with the Care Giver info if no contact has been entered.
        - If "New Contact" is highlighted and display the fields ready for a new contact Add
        - Default to highlighting the one contact in the select box (Care Giver is no other has been entered), and default the display of the contact in the fields
        - If more than one contact exists, display the contacts in the select box in Contact order, default to the last contact updated/entered and highlight and display in fields
    - Following the [Save and Continue] key selection, save the entered information into the Contacts Table and go to the next sequence screen.
    - Following the [Return Later] key selection, save the entered information into the Contacts Table and return to CareGiver Page.
    - Following the [Do not save] key selection, do not save the entered information and return to CareGiver Page.
    - If the user tries to leave the screen without selecting one of the three button, give an error message

" xxxxxxx"

Screen Name: 4.3.3 Care Recipient Physician Information

Screen Layout Design:



Screen Name: 4.3.3 Care Recipient Physician Information

Technical Notes:

- **Screen Title:** Care Recipient Medical - Physician Information (display title with Care Recipient First name to personalize the window)
- **Screen Design:** Formatted similar to other system screens, where information that is logical grouped is placed on single screens. The user is still allowed to exit the screen without changing information.
- **Screen Goal**: Allow a CareGiver to enter a minimum set of information.
- **Design approach**: Intended to be user friendly, intuitive with personalized instructions and greetings.
- **Screen Access**: CareGiver Page-Recipient Left Bar Menu; Directly from the Care Recipient Contactl Information [Continue] Key
- **Top Menu Bar:** Caregiver Page Top menu Bar
- **Left Column Menu Bar:** 1) CareGiver Page Left Column Menu Bar; 2) CareGiver - Care Recipient Left Menu Bar
- **Table Access:** 1) Caregiver Table (Read), 2) Patient Table (Read), 3) Patient Physician Table
- **Required Fields:** see screen for identified fields
- **Default Fields:** If no nickname is added, default first name for nickname.
- **Drop Down Box:** "Status", "Specialty 1" and "State" fields are selected through a drop down box, first letter typed and go directly to that position in the list. See Tables Definition in the Appendix for field Drop Down Box values
- **Screen processing:**
    - When initially displaying window,
        - If there are no physicians entered, default to highlighting the "New Physician" and display the fields ready for a new physician Add.
        - If there is only one physician entered, default to highlighting the one contact in the select box, and default the display of the physician in the fields
        - If more than one physician exists, display the physician in the select box in physician order, default to the last contact updated/entered and highlight and display in fields
    - [Search for Physician] button goes to the Search Physician search function, which searches a list of predefined physicians
    - Following the [Save and Continue] key selection, save the entered information into the physician table and go to the next sequence screen.
    - Following the [Return Later] key selection, save the entered information into the physician Table and return to CareGiver Page.
    - Following the [Do not save] key selection, do not save the entered information and return to CareGiver Page.
    - If the user tries to leave the screen without selecting one of the three button, give an error message

" xxxxxxx"

Screen Name: 3.2 Shopping Manager

Screen Design Layout: Shopping Mgr

TOP ENU | Home | Janice's Organizer | Shopping Manager | CareHelper Guide | Contact Us

< error messages screen area >

Shopping Manager

SORT ADD ALL **Suggestions and Reminders**

Date	Item		Person		Delete
11/23/1999	<item_description	>	<patient.nickname>	Add Now	☑
11/19/1999	<item_description	>	<patient.nickname>	Add Now	☑
11/18/1999	<item_description	>	<patient.nickname>	Add Now	☐
11/18/1999	<item_description	>	<patient.nickname>	Add Now	☐

SORT ADD ALL **Prior Shopping Items**

<cargiver.firstname>'s List				Del
Medications				
<item_description	>	<cg.location>	Add Now	☐
<item_description	>	<cg.location>	Add Now	☐
Supplies				
<item_description	>	<cg.location>	Add Now	☑
Other				
<item_description	>	<cg.location>	Add Now	☐
<item_description	>	<cg.location>	Add Now	☐
<patient.nickname>'s List				
Medications				
<item_description	>	<cg.location>	Add Now	☐
<item_description	>	<cg.location>	Add Now	☐
Supplies				
<item_description	>	<cg.location>	Add Now	☑

*** CURRENT LIST ***

PRINT SORT NEW ITEM CHECKOUT

<caregiver.nickname>

Qty	Item	Delete
001	<shoplist.item_desc	☐
001	<shoplist.item_desc	☐
001	<shoplist.item_desc	☐
001	<shoplist.item_desc	☐

<patient.nickname>

Qty	Item	Delete
001	<shoplist.item_desc	☐
001	<shoplist.item_desc	☐
001	<shoplist.item_desc	☐
001	<shoplist.item_desc	☐
001	<shoplist.item_desc	☐
001	<shoplist.item_desc	☐
001	<shoplist.item_desc	☐

<patient.nickname>

Qty	Item	Delete
001	<shoplist.item_desc	☐
001	<shoplist.item_desc	☐

SAVE FOR LATER EXIT

Screen Name: 3.2 Shopping Manager

Technical Notes:

- **Screen Title:** Shopping Manager (display title)
- **Screen Design:**
- **Screen Goal**:
- **Design approach**: Intended to be user friendly, intuitive with personalized instructions and greetings.
- **Top Menu Bar:** Caregiver Page Top menu Bar
- **Left Column Menu Bar:** Shopping Manager Left Menu Bar
- **Table Access:** 1) Caregiver Table (Read), 2) Patient Table (Read) 3) Shopping Manager
- **Required Fields:** n/a
- **Default Fields:** n/a
- **Drop Down Box:** n/a
- **Buttons: RESET; SAVE; EXIT; PRINT; CLEAR ALL; NEW ITEM**
- **Screen processing:**
    - Load the entire default Shopping Manager Prior Lists into the main center window
    - Load the Suggestions and Reminders in the Suggestions area and sort by Person by Item
    - Display the Current List items selected To-Date and corresponding quantities
    - First time entering the window, display the Shopping Manager sorted by Caregiver list, Patient list. Within each list sort by Medications, Supplies and Other and within each subcategory sort by item.
    - Button Processing:
        - [Save for Later] saves the screen for later use and processes any of the screen check-offs for removing (delete) from any indicated lists.
        - [EXIT] exits without saving any of the changes or does any additional processing
        - [RESET] Clears and resets the current shopping list.
        - [New Item] Displays a pop up window with a new item to add to the current list window
        - [Print] prints the current list
        - [Add All to List] adds every item in the current box to current list with a default "001" quantity.
        - [CHECK OUT] - prints the current list; clears and resets the current shopping list.
    - Display item CG location and allow drop down box changes. If Change Location is selected in the drop down box, go to a new window (pop box) to process the change location for the item. Allow to add a new location if needed.
    - In the current list window, the item is allowed to have zero quantity and still remain on the list until it is refreshed, then the item is deleted. Allow changing the number of items from 0-999.

Screen Name: 4.7 Monitor Device Set Up

Screen design Layout:

TOP MENU **Home** **Janice's Organizer** **Shopping Manager** **CareHelper Guide** **Contact Us**

< error messages screen area >

<patient.nickname>'s Monitor Device Set Up

Select or Add a Device,

Device	Collection Method
Pill Bottle	Auto
Blood Pressure	na
Blood Glucose	Auto
Body Weigh	Manual
Dose Pager	na
New Device	

Screen Name: 4.7.5 Pill Bottle Device Set Up

Screen design Layout:

TOP MENU **Home** **Janice's Organizer** **Shopping Manager** **CareHelper Guide** **Contact Us**

< error messages screen area >

<patient.nickname>'s Pill Bottle Device Set UP

Pill Bottle Set Up Instructions

Step 1:
Step 2:
Step 3:
....

Select a Medication for Pill Bottle Set UP

Medications	Dispense Method	Pill Bottle No.	Status
<patient.meds>	Pill Bottle	101	Active
<patient.meds>	Manual	na	Inactive
<patient.meds>	Pill Bottle	<pbottle.assignno>	<pbottle.status>
New Device			

<patient.meds>

Dispense Method Pill Bottle ▼ **Assigned Number** <pbottle.assignno> ▼

Status <pbottle.status> ▼

Pill Bottle Begin Date <pbottle.begindate> **Pill Bottle Stop Date** <pbottle.begindate>

Bottle Fill Days Supply <dayssupply> ▼ (i.e. number of pills placed in bottle for each fill)

Dosage *<medsdosage>* **Units** *<medsunits>*

Times per day *<medsinterval>* or ○ ***As Needed***

Set Daily Dosage Time: 12:15 AM **Alarm?** ● Yes ○ No ▲

Set Daily Dosage Time: 12:15 AM **Alarm?** ● Yes ○ No ▼

[Setup Pill Bottle] [Finish Later] [Refill] [Do Not Save]

Italic fields are display only (from medications set up screen)

TOP MENU **Home** **Janice's Organizer** **Shopping Manager** **CareHelper Guide** **Contact Us**

< error messages screen area >

<patient.nickname>'s Monitor Device Set Up

TBD

....

Select or Add Device,

Device	Collection Method
Weight /Temp Measure	Manual
Blood Pressure	na
Blood Glucose	Auto
New Device	

Weight/Temp

Please select the date for <patient.nickname>'s Weight/Temp Set Up and complete the information:

Weight/Temp <Date> <weight> [Add New Weight/Temp Measure]

Please complete the following information:

Measure Method Manual

Date <Date>

Weight Measure **<wmeasure>** **Range: High <weighthigh> Low <weightlow>**

Temp Measure **<tmeasure>** **Range: High <temphigh> Low <templow>**

[Save and Continue] **[Finish Later]** **[Do Not Save]**

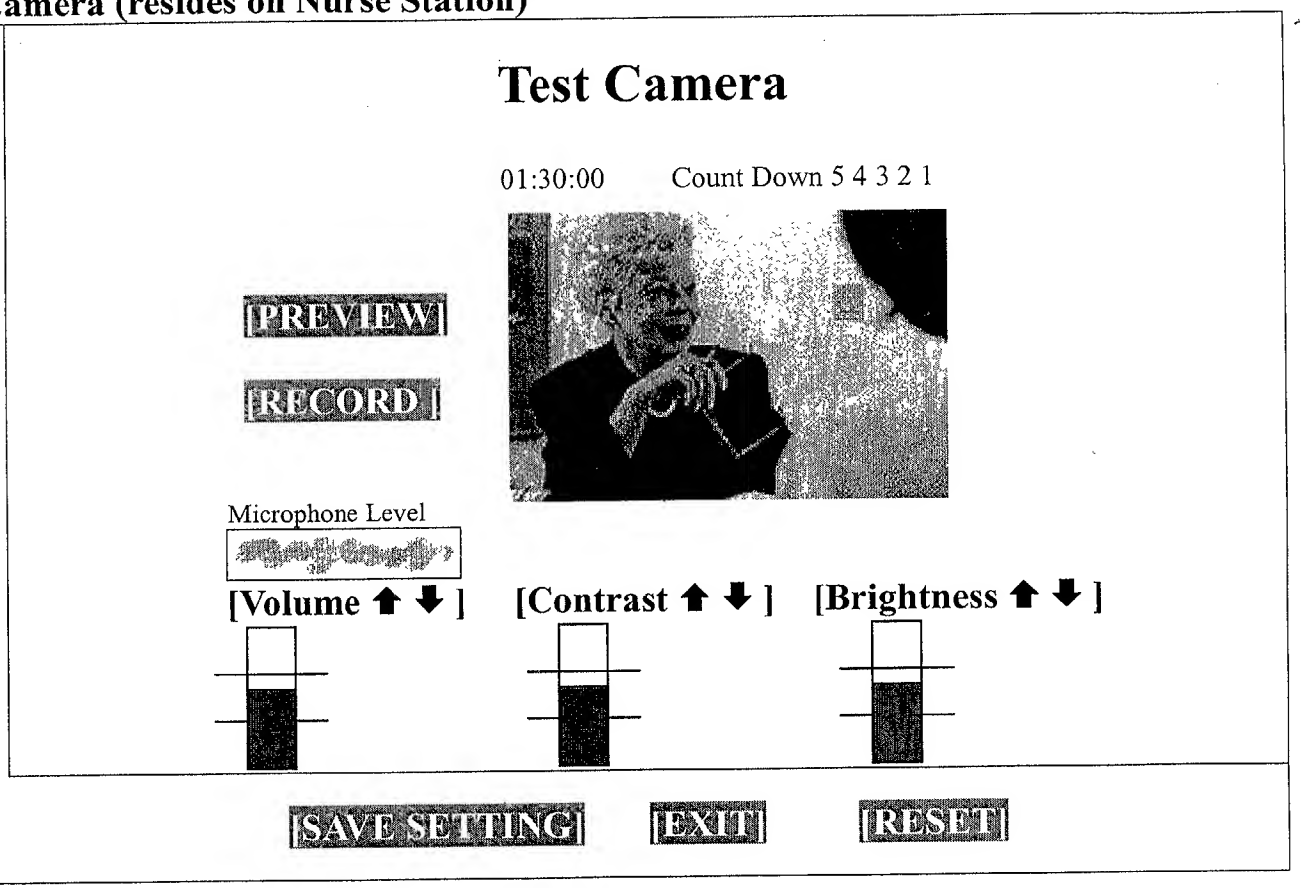
CareHelper.com Nurse Station Design - 12/23/99

The design of the Nurse Station is done in three (3) phases:

1. Prepare to make the video
    - 1.1 Test Camera
    - 1.2 Select CareGiver and Care Recipient
    - 1.3 Select Reports for Presentation
2. Make the Video/Presentation
    - 2.1 Make the Video
3. Review Video/Presentation and Submit
    - 3.1 Review Video and Flip Charts

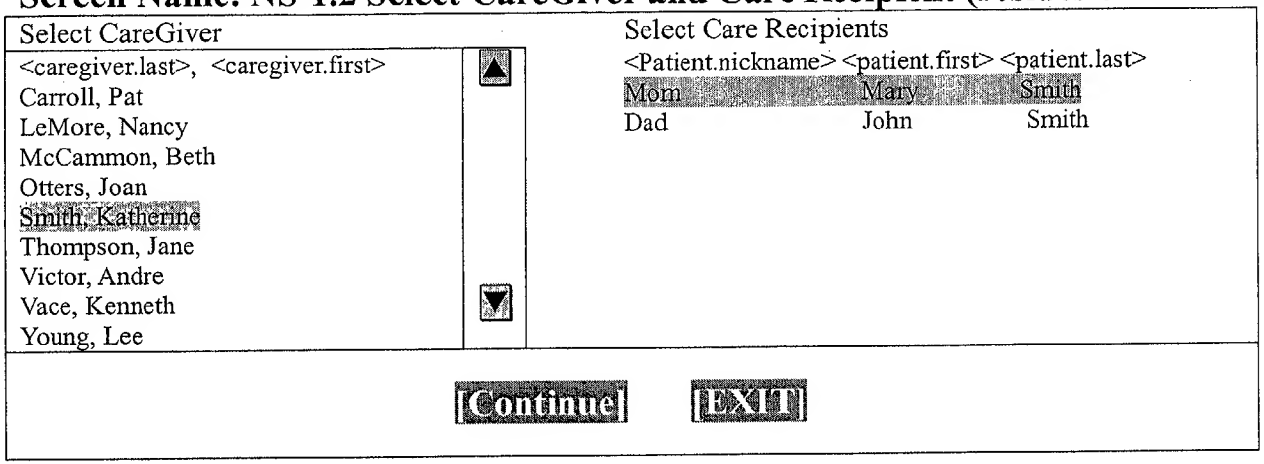
Screen Name: NS - 1.1 Test Camera (resides on Nurse Station)

Step by Step Instructions
1. Adjust camera hardware
2. Preview video Adjust Volume, Contrast and Brightness
3. Preview Video
4. Save Setting



Overview:
1. The purpose of this screen is to allow the Nurse to be able to view themselves and adjust the hardware and controls (Volume, Contrast and Brightness, only)
2. Test Camera Screen resides on the Nurse Station along with the Camera software.
3. The video is recorded as Mirror Image.
4. The camera is always on, see viewing the image starts immediately when first entering the screen.
5. [RECORD] does a count down from 5, before it starts recording
6. [PREVIEW] previews the last test recorded video.
7. Control settings show the current and recommended range of volume, contract and brightness.
8. Above the Volume controls is a microphone recording feedback bar, which indicates the microphone recording level.
9. Note: The technical video settings that impact processing, quality, performance, compression and sending the video is to be accessed by a separate System Administrator screen only.

Screen Name: NS-1.2 Select CareGiver and Care Recipient (resides on web server)



Overview:

1. Purpose of screen is to select who we are making the presentation for: CareGiver / Care Recipient
2. All of the CareGivers previously assigned to a nurse will be displayed in the CareGiver List. Default to highlighting the first CareGiver in the list.
3. When a CareGiver is highlighted, all of the Care Recipients associated with the CareGiver will be displayed in the Care Recipient window. - default highlighting the first Care Recipient listed.
4. This screen is based on the web-server, and accessed by the nurse through the Nurse Base Station. This interface is has seamless as possible to the nurse.
5. After selecting the CG, CR and the[Continue] button is pressed, the selected information required to complete the Presentation is returned to the Nurse Station, to complete the video.
6. EXIT exits the screen and returns to the NS Main Screen.

Screen Name: NS - 1.3 Select Reports for Presentation (resides on web server)

CareGiver: Eric Brown
Care Recipient: Mary Smith

Presentation Date: mm/dd/yyyy
Nurse: Ms. Kathy Kindess

Select Reports to include in Presentation:

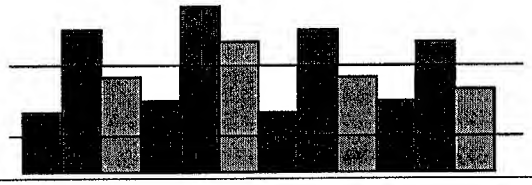
[View Prior Presentation]

Include	Reports	Description
[x]	Report Template1	eport Template 1 Descr
[ ]	Report Template2	
[x]	Report Template3	
[x]	Alerts	

Presentation Summary Bullet Points:

- Blood pressure in normal range
- etc.
-
-
-

View Selected Report:



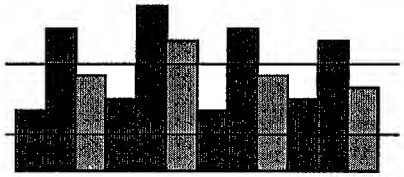
Enter Clinical Notes for Selected Report:
Patient periodically is outside the recommended range, and needs to be monitored closely during the holidays.

[<< BACK] [NEXT >>] [EXIT] [RESET]

Overview:

1. Purpose of screen is to select the reports to be included in the presentation. In addition, clinical notes, that remain confidential to the clinician may be entered for each report
2. "1.3 Select Report for Presentation screen" resides on the web server and the information needed to create the video is sent back to the Nurse Station.
3. Select Reports Windows:: For a given CareGiver/ Care Recipient a list of the CR custom report templates (made previously). Default to highlighting the first report in the list.
4. [View Prior Presentation] clears the current report selections and shows the reports and notes loaded for the prior presentation.
5. View Reports Window: When a report is highlighted display the report/graph in the viewing window.
6. Clinical Notes Window: Display the associated clinical notes for the selected report. These notes are only viewed by the nurse and are specific for the presentation/report only.
7. Presentation Summary Window: Every presentation has a "Presentation Summary" report which the nurse prepares in outline format with bullet points. This Summary is saved as a report to be viewed in the presentation. This Summary Window allows the creation and editing of the summary.
8. [RESET] resets the screen.
9. [EXIT] exits the screen and returns to the Main NS Screen. Warn the user that exiting will loose all presentation prep work.
10. [Next] saves the presentation info and goes to the next phase of screens: "2.1 Make Video" screen.
11. [Back] returns to the prior screen.

Screen Name: NS - 2.1 Make Video (resides on Nurse Station)

CareGiver: Eric Brown **Care Recipient:** Mary Smith	**Presentation Date:** mm/dd/yyyy **Nurse:** Ms. Kathy Kindess
Clinical Notes for Selected Report *(not included in presentation):* Patient periodically is outside the recommended range.	**02:31:00 Count Down 5 4 3 2 1**
	Presentation Reports. Select the report for the presentation: **Order** **[1] Presentation Summary** **[3] Report 1** **[2] Report Weight/Temp** **[ ] Report Blood Pressure**
[REC] [PAUSE] [STOP]	**[RESET] [PREVIEW]**
[<< BACK] [NEXT >>] [EXIT]	

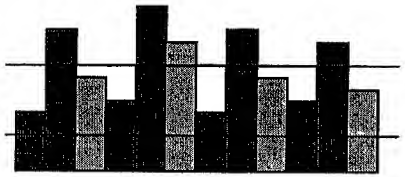
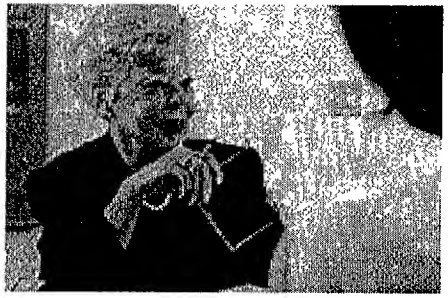
Overview:

1. Purpose of the screen is to make the video with the viewing of the reports
2. The video is recorded as Mirror Image.
3. [RECORD] does a count down from 5, before it starts recording
4. [PREVIEW] previews the last test recorded video. When first entering the screen, the [PREVIEW] is grayed-out and not accessible until a video has recorded.
5. The Presentation Summary Report and the previously selected presentation reports (from the prior screen) are displayed in the bottom right window as Thumb Nails. The ordering numbering of the reports remain blank. The ordering numbering indicates the order the reports were selected for presentation viewing. The system updates the ordering numbering after each report selection. When the Thump Nail Report is selected the corresponding clinical notes and report are viewed by the nurse in the appropriate window. Note the Presentation Summary does not have any clinical notes associated with it.
6. The timing of the Thumb nail selection indicates when each report is to be displayed during the video viewing. Example:
   Step 1: Select Presentation Summary and report displayed in bottom left window. System places "1" as the order number.

Step 2: Press [Rec], and the video starts recording.
Step 3: Select Report Weight Temp, report loads while video is still recording.
Step 4: Press [Pause], recording pauses but report continues to load.
Step5: After report has fully loaded, nurse presses [Pause] again to continue video recording.
Step 6: etc.

7. The REC, PAUSE and STOP buttons visually look like the buttons on a video player.
8. The [BACK] button allows the Nurse to go back to the previous page and make changes if necessary and return to continue the video from this page, if the video has been paused.
9. [Pause] button pauses the video recording but does not interfere with selecting and loading of reports. Re-pressing the [Pause] will continue the video recording
10. [STOP] stops the video recording and completes the video. Once the video has been [STOP] stopped, it cannot be modified.
11. EXIT exits the screen and returns to NS Main Screen. Warn the user that exiting will loose all presentation prep work.

Screen Name: NS - 3.1 Review Video and Flip Charts (resides on Nurse Station)

Presentation xxxx for <patient.fullname>	
	00:31:00  [Replay]
[Deliver to Eric Brown] [REDO] [EXIT]	

Overview:

1. Purpose of the screen is view the presentation exactly as the CareGiver will view the presentation and submit the final presentation to be sent to the CareGiver.
2. [REPLAY] plays the presentation exactly how the presentation is to be viewed.
3. [Deliver to Eric Brown] delivers the presentation to the selected CareGiver through the web-server. Also, an alert is generated indicating a presentation has been sent and needs to be view. Lastly, an email is sent to CareGiver that a video has been prepared and needs to be review.
4. REDO returns the Nurse back to the NS-2.1 Make Video screen to redo the video.
5. EXIT exits the screen. Warn the user that exiting will loose all presentation prep work.

Triggers for Alerts and Shopping Manager Suggestions and Reminders - 2/4/2000 revised

WEB ALERTS	BASE STATION ALERT	SHOPPING MANAGER SUGGESTIONS & REMINDERS
• Pill bottle and other devices successfully programmed & setup	• Pill bottle and other devices successfully programmed & setup	• Pill bottle medication is down to a one week supply. Base on a variable set up by the CG
• New pill bottle program or change to program needs to be loaded onto pill bottle	• New pill bottle program or change to program needs to be loaded onto pill bottle	• Automatic reminders for Birthdays for CG and CR. 14 days
• Automatic Device data has not been sent for 24 hrs or more. Specify which device based on device setup eg. "Didn't receive base station data"	• Device data has not been sent for 24 hrs or more. Specify which device based on device setup eg. "Didn't send data to web server"	• Suggestions and reminders manual input by Nurse from the Nurse Station
• Pill medication scheduled event has been missed (based on a variable that the CG sets up)	• Low Battery indicator	• System wide alerts sent by he System Admin (such as if we have an updated program) - for individual or all
• Nurse sends presentation		• Suggestions and reminders manual input by CG
• Any device goes in to the red zone (above or below the high / low range. Based on a variable indicator the CG sets up for each device)		
• Low Battery indicator		

Notes -

- Base station is a pop up to remind me later - type in number with drop down box that says hours or days
- Web station alerts have a checked box that needs to be manually checked to go away
- Lists the web server alerts in newest to latest order
- Collect check boxes and do an one event delete in Alert box on CG page
- Nurse can send messages through email to CG
- Need Suggest and Reminder screen for Nurse Station to be able to list a Shopping Mgr Suggestion and Reminders
- New screen for CG to also enter a Suggestion and Reminders for Shopping Mgr